U.S. Department of the Interior
Bureau of Land Management

ePlanning/D2
User Manual
Comprehensive Reference Guide
October 31, 2017

PREPARING OFFICE
U.S. Department of the Interior
Bureau of Land Management
Denver Federal Center, Building 50
Denver, CO 80225 USA

ePlanning/D2 User Manual
Comprehensive Reference Guide

Table of Contents

October 31, 2017

This page intentionally left blank

Chapter 1. Introduction to ePlanning

1.1. Introduction

This chapter will serve as an introduction to ePlanning and will discuss the following:
- The definition of ePlanning and its intended use
- The ePlanning application software, its related components
- The benefits of utilizing ePlanning
- Navigating the BLM National NEPA Register

1.1.1. Definition of ePlanning and Intended Use

Definition: ePlanning is a customized software application that allows for project/document creation, document management, publication, and public commenting during the Land Use Planning (LUP) and National Environment Policy Act (NEPA) processes. The application includes functionality to manage the content in documents, publish the content to print (paper) and web formats, create and enable documents for comments, and comment analysis.

Purpose: ePlanning is currently used by BLM employees and contractors to develop and publish projects/documents that reach all levels of the BLM organization and the general public. ePlanning has been primarily developed to support the BLM's NEPA and LUP processes with the intended flexibility to eventually support other Department of the Interior (DOI) agencies and projects.
Uses for ePlanning include, but are not limited to the creation and publication of the following:
- Categorical Exclusions (CX)
- Environmental Assessments (EA)
- Environmental Impact Statements (EIS)
- Determination of NEPA Adequacy (DNA)
- RMP revisions and amendments with associated NEPA documents
- Other documents related to the land use planning process for public viewing and commenting

Goal: ePlanning facilitates a multi-disciplinary approach from planning development and document management to publishing projects/documents on the web for public participation and notification.

1.2. The ePlanning Software and Components

The ePlanning application software enables many planning processes, which include:
- Document, project, content and task management
- Authoring, reviewing, and publishing

- Comment analysis
- Web page creation and publication

The ePlanning applications are accessed through Documentum 2 (D2). The main components are D2, Back Office and the Word templates which will be explained further in this manual. Benefits of Using ePlanning

Let's take a look at how ePlanning benefits you, your office, the BLM, and the general public.

Your Benefits:
- Easily incorporate all team members in the creation of project documents
- Easily assign tasks to co-workers who can work on the same documents simultaneously
- Know when your co-worker is editing a piece of the project's document
- Track accountability of documents and assigned tasks

Your Office Benefits:
- Easy to create web pages to host the document content and supporting information
- The creation of a centralized access point for templates and content reuse
- Tracking of document versions and incorporating comments into the final products
- Receiving comments online which will go to a centralized database
- All team members know the status of documents

The BLM Benefits
- Standardized look and feel to products across organizational boundaries
- Improved ability for State, District, and Field Offices to access and share searchable documents and databases
- Consolidated and easy to find Bureau-wide BLM National NEPA Register

The General Public Benefits:
- Improved public outreach by creating more BLM transparency
- Being provided 24/7 access to documents on the Internet
- Ability to review and submit comments on documents posted online

1.3. Ability to see interactive map products for commentingNavigating to the BLM National NEPA Register

The following steps will show how to navigate to the nationwide NEPA and LUP registers. This is where all projects are stored giving a centralized one stop shop for finding all NEPA and LUP projects

1. Go to https://eplanning.blm.gov/epl-front-office/eplanning/nepa/nepa_register.do the National NEPA Register. Another way to find it quickly and easily is to Google search “nepa register” and click on the ePlanning 2.0 Front Office link.

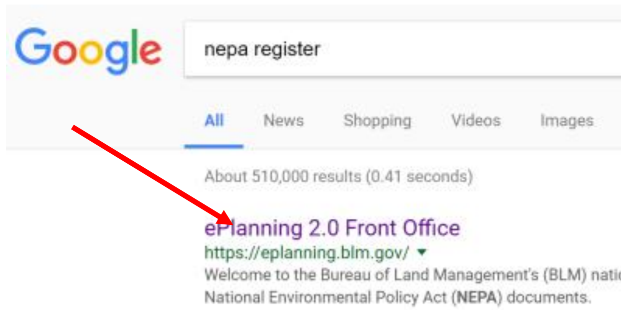


Figure 1.1

2. This is the BLM National NEPA Register. You have the opportunity to choose between NEPA or LUP although, the opening page defaults to the BLM National NEPA Register.

Figure 1.2

3. The register defaults to the "Map Search" option. Users can zoom into areas of interest and view the NEPA projects located nearby. Clusters of points will break into individual projects (represented by BLM logos) as the map zooms in. The basemap can be changed using the "Switch Basemap" button. Users can navigate to a project's website by clicking on the project icon, followed by the blue project name.

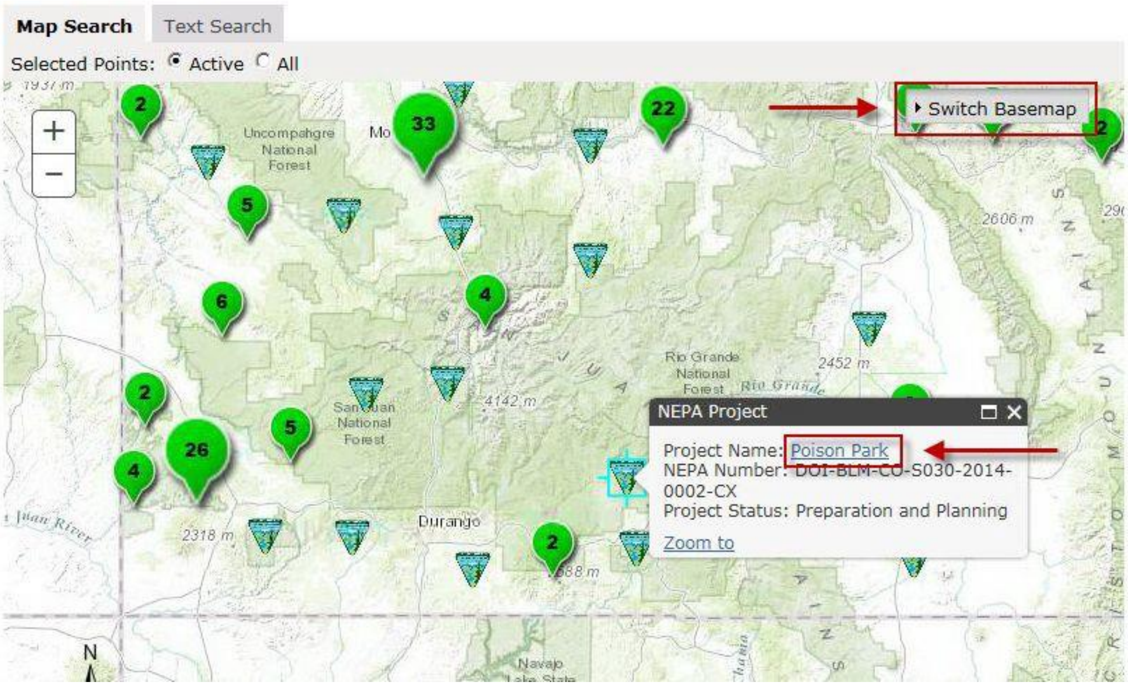


Figure 1.3

4. A text search option is available for those with a particular project or kind of project in mind. This can be accessed by clicking the "Text Search" tab at the top of the map. Users have the option to refine their search by state, office, document type, fiscal year filed, program, and by open comment period.

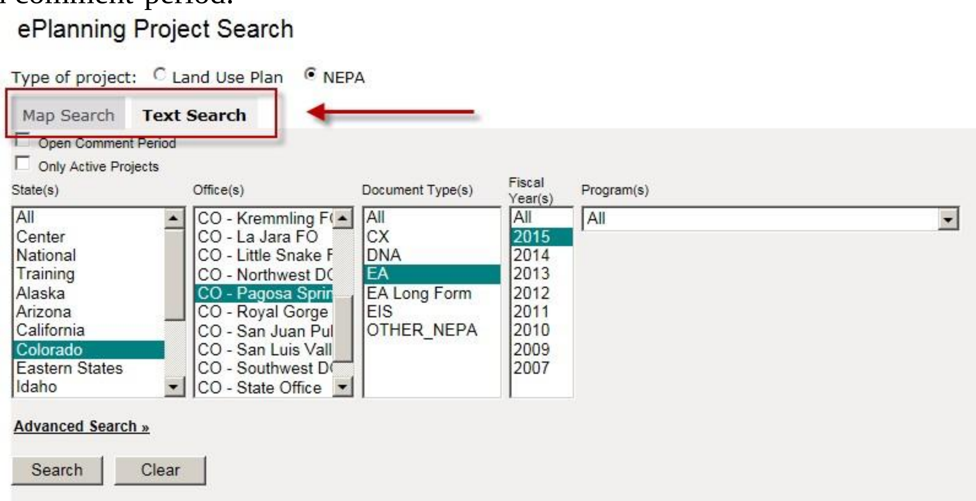


Figure 1.4

5. You can also click on the "Advanced Search" link and that will allow for a more specific search. Unless you know specifics about the project you are searching for, for best results use the **Site Page Text** search.

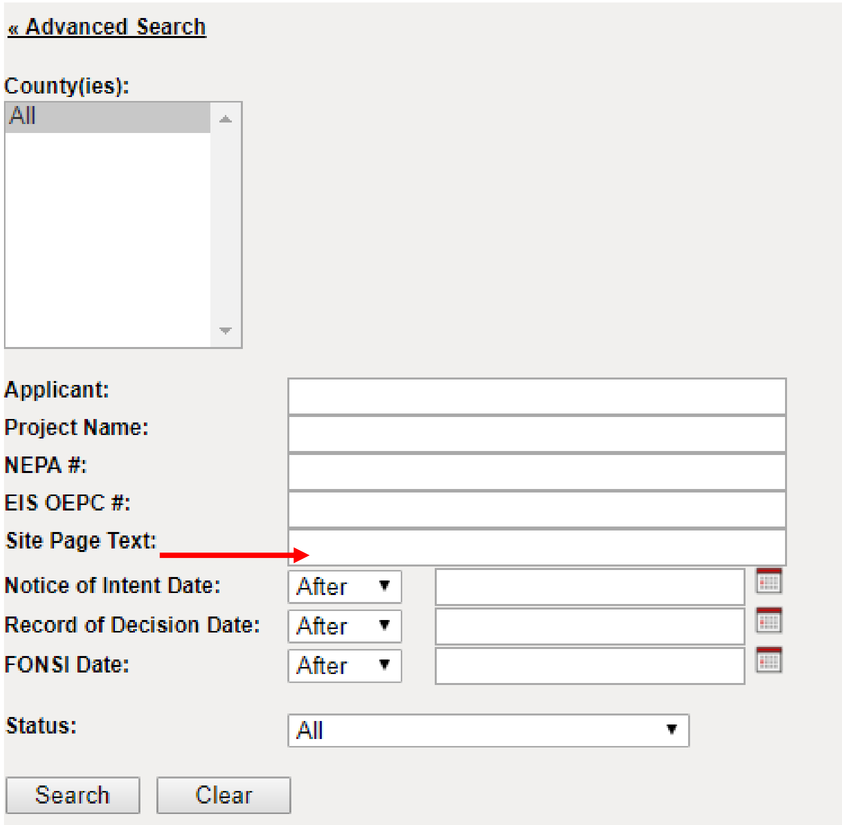
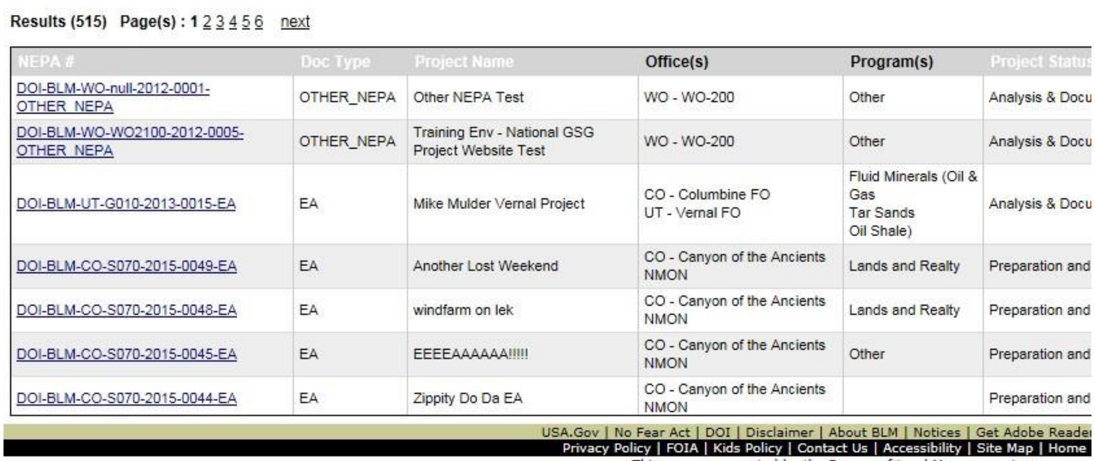


Figure 1.5

6. After clicking the “Search” button, the results will appear at the bottom of the page. Clicking on the blue NEPA number will direct the user to the project website.



Results (515) Page(s) : 1 2 3 4 5 6 next

NEPA #	Doc Type	Project Name	Office(s)	Program(s)	Project Status
DOI-BLM-WO-null-2012-0001-OTHER_NEPA	OTHER_NEPA	Other NEPA Test	WO - WO-200	Other	Analysis & Docu
DOI-BLM-WO-WO2100-2012-0005-OTHER_NEPA	OTHER_NEPA	Training Env - National GSG Project Website Test	WO - WO-200	Other	Analysis & Docu
DOI-BLM-UT-G010-2013-0015-EA	EA	Mike Mulder Vernal Project	CO - Columbine FO UT - Vernal FO	Fluid Minerals (Oil & Gas Tar Sands Oil Shale)	Analysis & Docu
DOI-BLM-CO-S070-2015-0049-EA	EA	Another Lost Weekend	CO - Canyon of the Ancients NMON	Lands and Realty	Preparation and
DOI-BLM-CO-S070-2015-0048-EA	EA	windfarm on lek	CO - Canyon of the Ancients NMON	Lands and Realty	Preparation and
DOI-BLM-CO-S070-2015-0045-EA	EA	EEEEAAAAAA!!!!!	CO - Canyon of the Ancients NMON	Other	Preparation and
DOI-BLM-CO-S070-2015-0044-EA	EA	Zippity Do Da EA	CO - Canyon of the Ancients NMON		Preparation and

USA.Gov | No Fear Act | DOI | Disclaimer | About BLM | Notices | Get Adobe Reader
Privacy Policy | FOIA | Kids Policy | Contact Us | Accessibility | Site Map | Home

Figure 1.6

Chapter 2. ePlanning
D 2 Basics

2.1 Introduction

This chapter will show you how to access Documentum 2 (D2) in the ePlanning application.

2.1.1 Objectives

Upon completion of this chapter, you will be able to:

- Access and log into D2
- Learn new terms associated with D2
- The layout of D2
- Explore the Widget gallery
- Logging out of D2

2.2 Accessing and Log into D2

In this section, you will learn how to access and log into the ePlanning D2 application.

All you need to remember is your BLM network user id and password. Since we have linked your login information to your Active Directory account, each time you change your BLM network password, the new password will be mirrored in ePlanning.

D2 can be accessed by clicking on the following link, which should be saved in the resulting browser: D2 ePlanning (Training)

NOTE: If these instructions are being read from paper, please enter the following text into the URL field of a browser window:
https://ilmocop0ap6107.blm.doi.net:8443/D2/#d2
Upon invoking the D2 link the following pop-up window will be displayed:

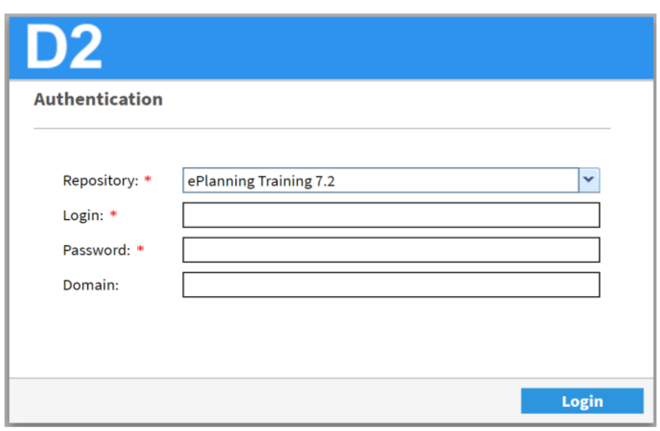


Figure 2.1

Once the user id and password have been accepted, you will see the following screen displayed in your browser. You have now successfully logged into ePlanning D2.

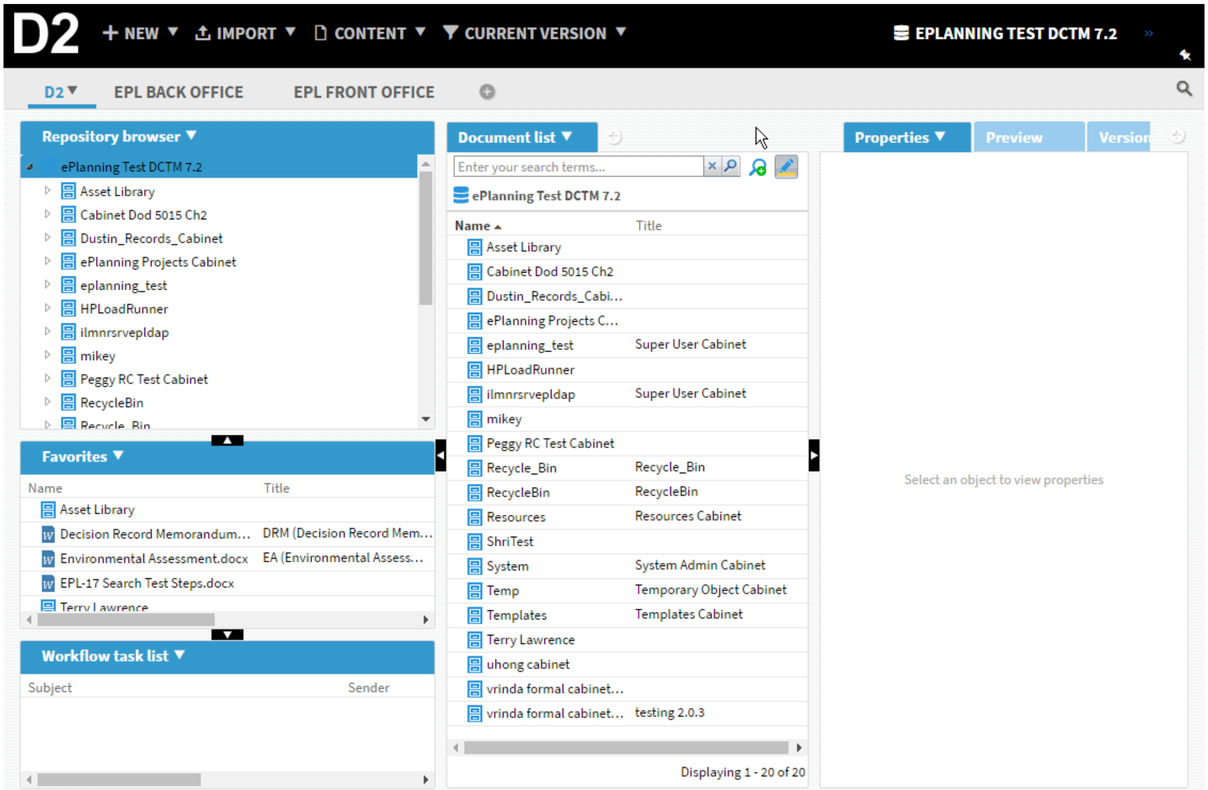
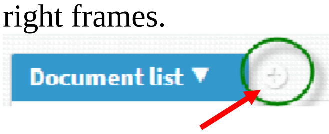


Figure 2.2

2.3 New Terms Associated With D2

Now that you have logged into D2, you will need to learn a little about new terms in this workspace.

Widgets – Are any tools, functions or functional areas found in ePlanning D2. The Widget Gallery can be displayed by clicking on the faint plus sign located at the top of the middle and right frames.



Relations - Displays a list of what is linked to the selected content. This widget manages content distribution by allowing you to start distributions, edit the list of recipients, and generate reports.

Tasks Browser - Displays a list of tasks sorted by category that have been assigned to you. Use this widget to refresh the Workflow task list widget.

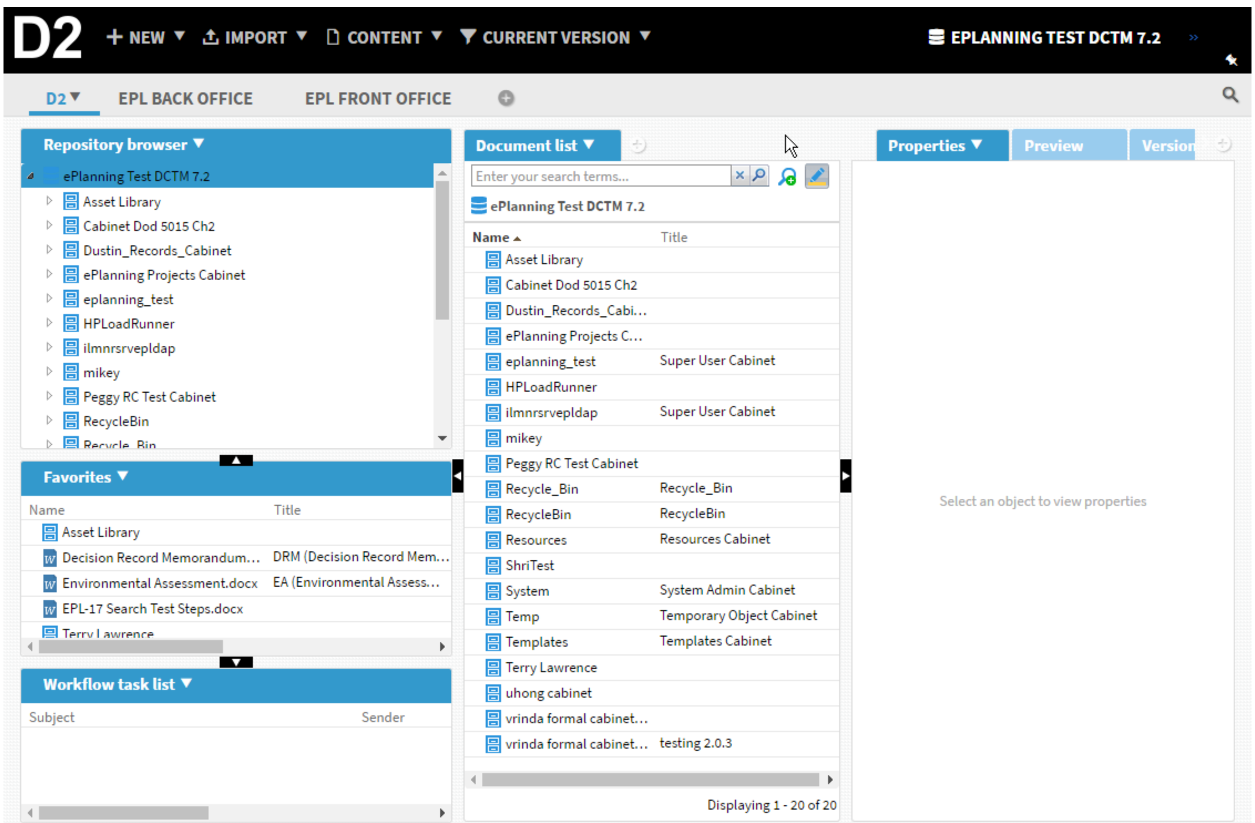
Workflow History - Displays a list of past and current events to show workflow progress.

You must have at least queue manager permission to access this widget.

Task Details - Displays the subject and message of the selected task.

2.4 Screen Layout of D2

Now that you know some terms look at the layout of the screen. D2 presents the ePlanning tools utilizing a master web page, also known as a Work Space, and then presents 3 frames; left, middle and right.



Left	Middle	Right
Repository browser – Displays cabinets and folders	**Document list** - Displays content and virtual documents. Enables full browsing and content-seeking capabilities. Use this to access the content context menu. Displays results from quick search and predefined searches. Provides a quick search toolbar (located at the top) to enable quick search capabilities	**Properties** - Displays properties of the selected content
Favorites – Displays list of contents you mark as favorites (subscriptions)		**Previews** - Displays the selected content as a slideshow. You must set up an ADTS rendition server to render previews and storyboards.
Workflow task list - Displays a list of tasks that have been assigned to you		**Versions** - Displays a list of the versions of the selected content.

Figure 2.3

D2 centralizes planning and NEPA information from the whole Bureau, you can easily find planning and NEPA information from your colleagues all over the country. In order to help you get accustomed to this part of ePlanning, we will navigate around the application to help you get acquainted with the look and feel of Webtop.

2.4.1 Widget Gallery

In addition to the Widgets shown in the default Work Space, other Widgets are available from the Widgets Gallery (any Widgets greyed out are ones already displayed in the Work Space. The Widget Gallery can be displayed by clicking on the faint plus sign located at the top of the middle and right frames.

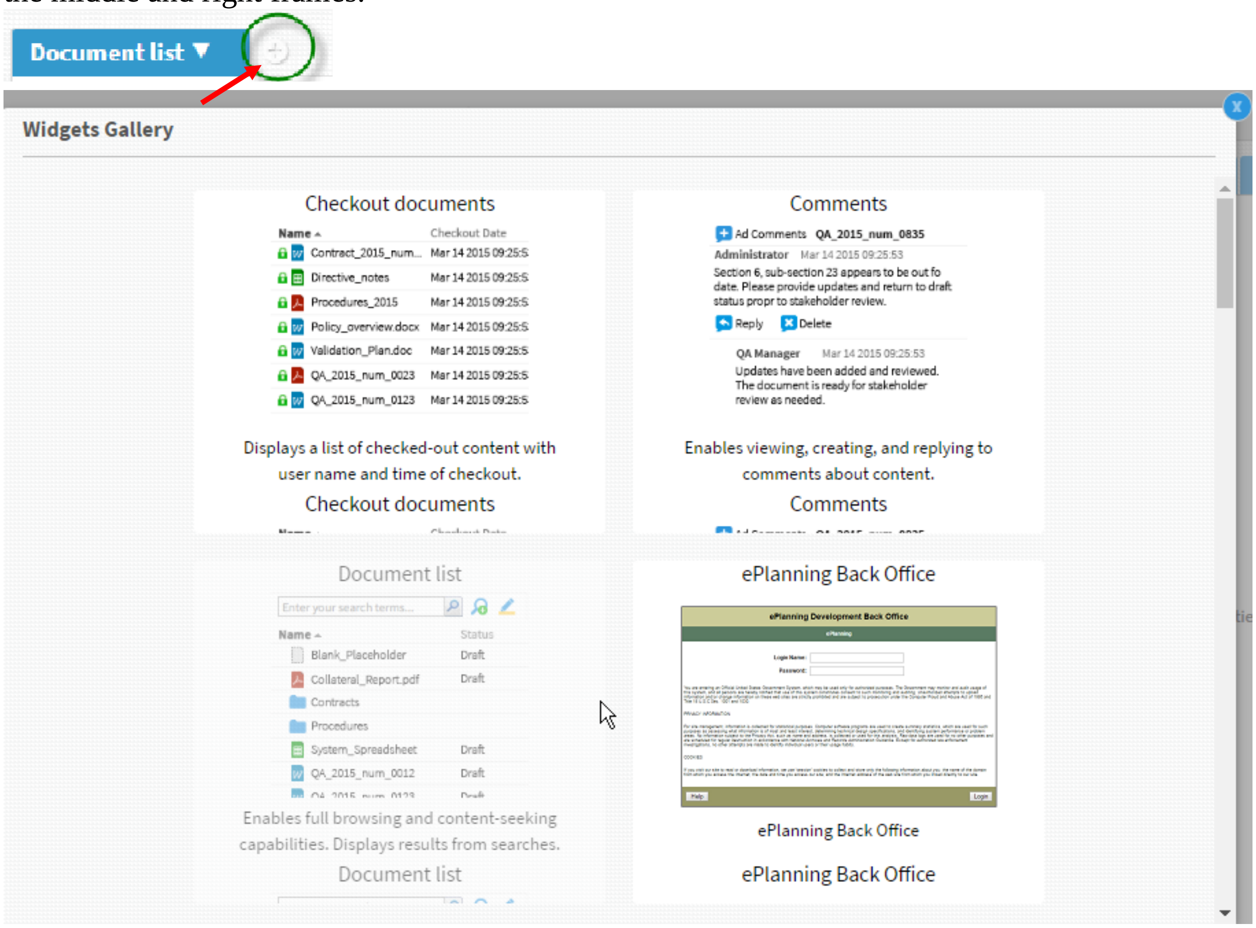
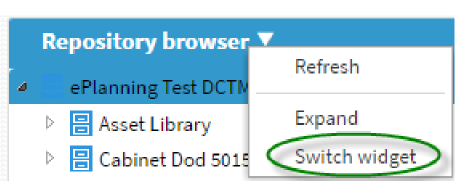
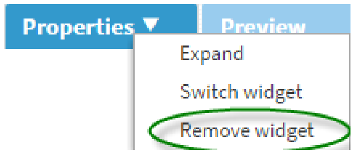


Figure 2.4

The Widget Gallery can also be displayed by selecting the Switch widget option from the drop down arrow of any group in the left frame.



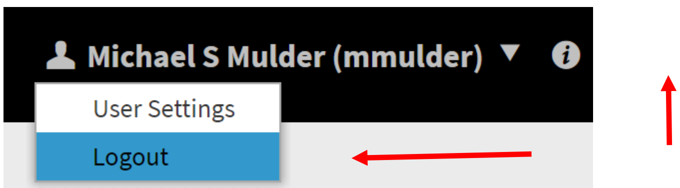
To remove a Widget, click on the drop down menu of the Widget and select Remove Widget.



2.5. Logging out of ePlanning

This section will guide you through logging out of both ePlanning and D2.

Now that you have successfully logged into ePlanning, please log out of the system. To do so, click on your name and then the **Logout** link in the upper right corner of the window (see below image).



After you have logged out of ePlanning D2, close the window.

Chapter 3. Creating a New NEPA Project

3.1. Introduction

This chapter will show you how to create a new NEPA project in ePlanning.

3.1.1. Objectives

Upon completion of this chapter, you will be able to:

- Create a new NEPA Project in ePlanning.
- Generate a NEPA number.
- Add/Edit information about the project.
- Provide access and define roles for people that will be working on the project.
- Understand how ePlanning project information is used throughout the ePlanning system.

3.2. Working with Projects in ePlanning D2

Within the ePlanning system, the *Project* is an important "hub" for working on NEPA and Land Use Planning projects. Information about the project (referred to as Project "properties," "attributes," or "metadata") can be entered once and is used throughout ePlanning to populate project documents. Many of the ePlanning tools that help integrate the tasks of document authoring, editing, reviewing, are accessible by working with the project in D2. An ePlanning project also includes folders and sub-folders that help organize and store information for the project.

Within the ePlanning project, you can:

- Record important information about the project, such as lead office, description of the proposed action, applicant, and location.
- Define the team of resource specialists who will be working on the document.
- Identify any cooperating agencies and keep track of correspondence with them.
- Identify funding sources.
- Identify contractors.

The rest of this chapter will show how to create a new NEPA Project, add/edit project information, and add new team members to the project.

3.3. Creating a New NEPA Project - the Background Tab

Follow these steps to create a Project.

1. Log into D2 (see chapter 2).
2. Click on the Create Project button.

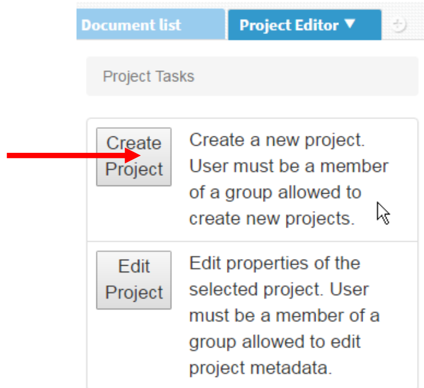


Figure 3.1

The **Project Editor** Widget frame will refresh and show the initial fields of the project.

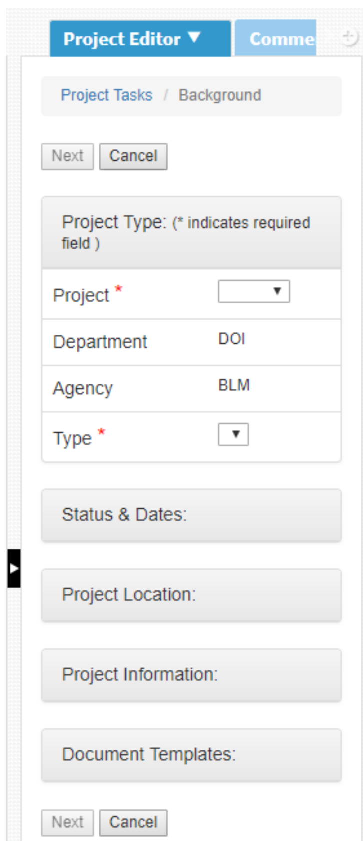


Figure 3.2

If the Project Editor Widget frame does not show enough of the information or fields, placing the mouse pointer on the arrows to the right or left and the holding down the left mouse button will allow you widen the frame at the expense of the adjacent frames.

If a full screen is preferred, double click on the **Project Editor** label at the top or click on the down arrow in the **Project Editor** label and select **Expand**.

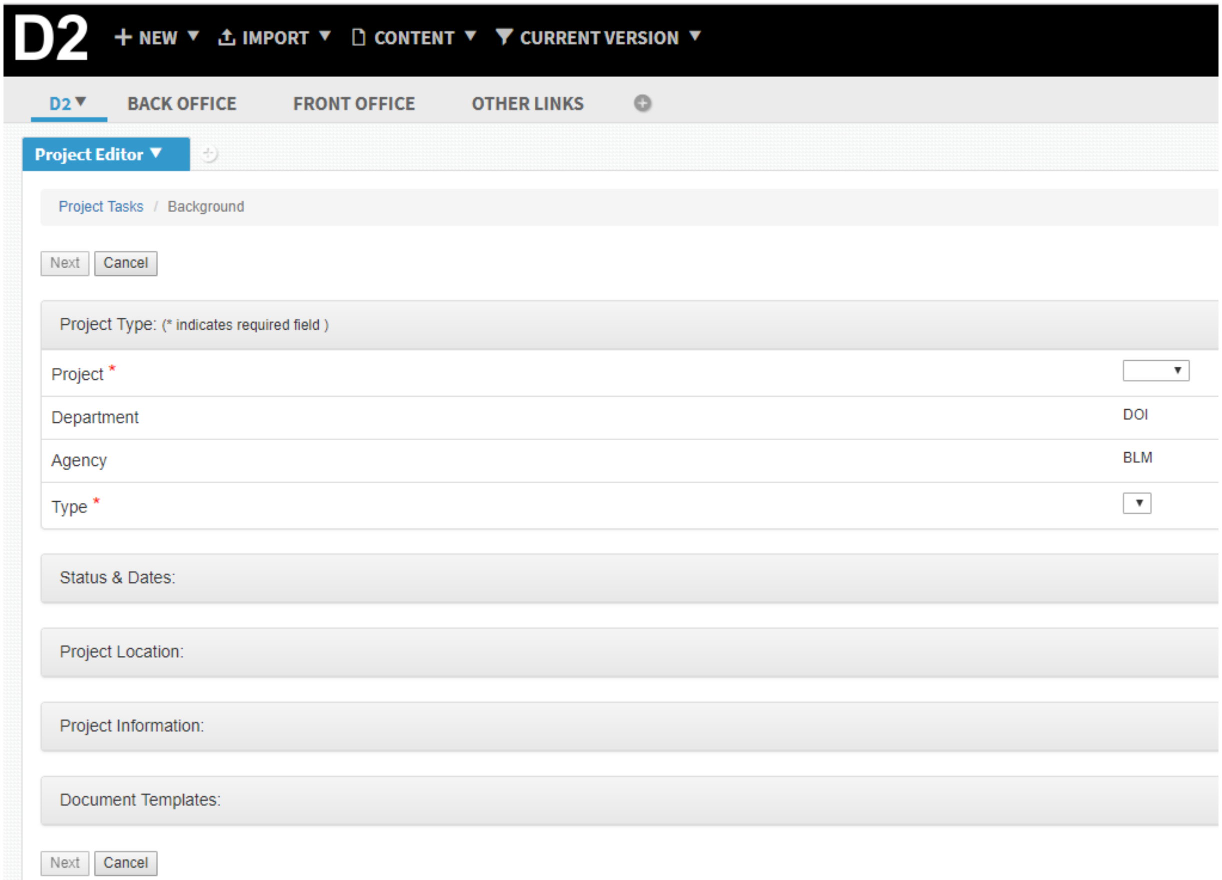
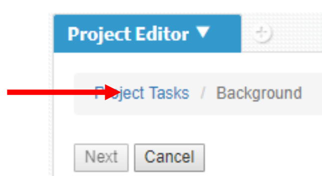


Figure 3.3

Double clicking on the Project Editor Label or clicking on the down arrow in the Project Editor label and selecting Collapse will reduce the size of the Project Editor Widget and the screen will return to the default display and include any changes to the screen.

Project Tasks

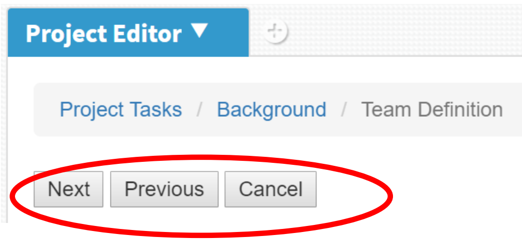
At the top of the frame there is a Project Tasks label.



This label indicates which task you are currently during the creation and editing of a project. When creating a project, this value will default to **Background**, indicating the background information is being shown in the Project Editor Widget frame.

Navigation Buttons

At the top right of the Project Editor Widget frame are displayed a set of two buttons, **Next** and **Cancel.** Three (3) navigation buttons will appear after the first tab has been completed for easy navigation.



The **Next** button will initially be disabled until all required fields contain values. When enabled, this button will take the user to the next screen. In the initial state of the widget, the **Next** button will take the user to the Team Definition screen.

The **Previous** button will return the user to the previous screen. In the initial state of the widget, the **Previous** button will take the user to the Project Editor Widget initial screen displaying the Create Project and Edit Project buttons.

The **Cancel** button will take the user to the Project Editor Widget initial screen displaying the Create Project and Edit Project buttons. This will be true when either creating or editing a project and prior to saving the project.

3.3.1 Field Groupings

In the initial Project Create screen there will be 6 shaded Group labels. Each of these labels indicates a category of fields that are contained within. Clicking on each Group label (single click) will result in the group expanding to show the associated fields and values. Clicking once on the expanded Group label will result in that group contracting and no long displaying the associated fields and values.

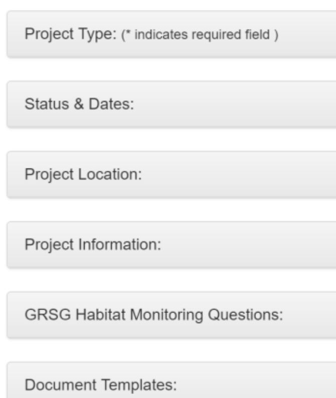


Figure 3.4

The only exception will be the GSRG Habitat Monitoring Questions group. Until all required fields have a value, this group cannot be opened. Work down through the fields starting at the top In the Project Type group. In order to successfully create a project you must complete all of the **required fields** in the **Background** and **Team Definition** tabs.

3.3.2 Background Fields

3.3.2.1 Project Type Field Group

D2 utilizes the same Project Editor Widget for both NEPA and RMP projects. This will require that the Project and Type will be entered first. Both fields are required.
At any point, if a required field is skipped, an orange **Required** label will be displayed next to the field.

NEPA Project

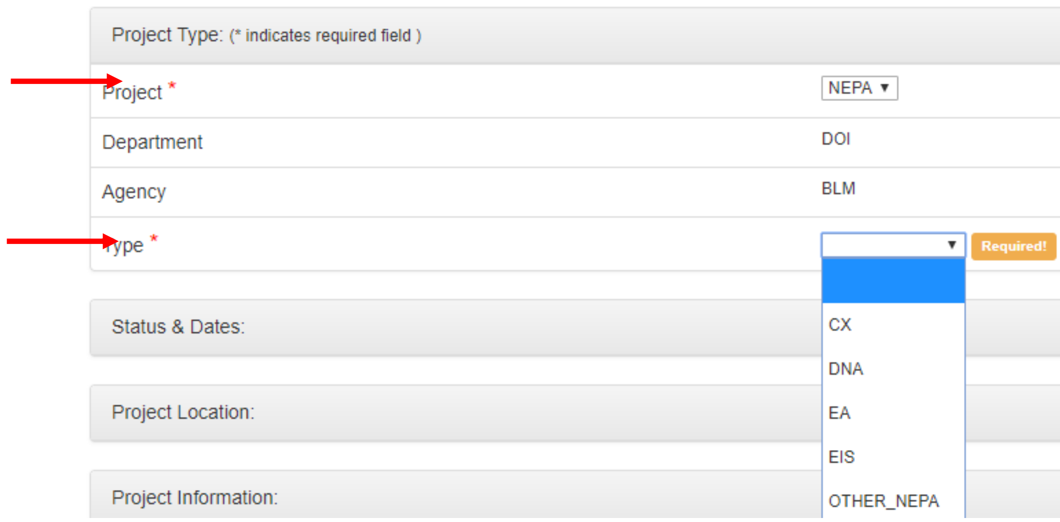


Figure 3.5

RMP Project

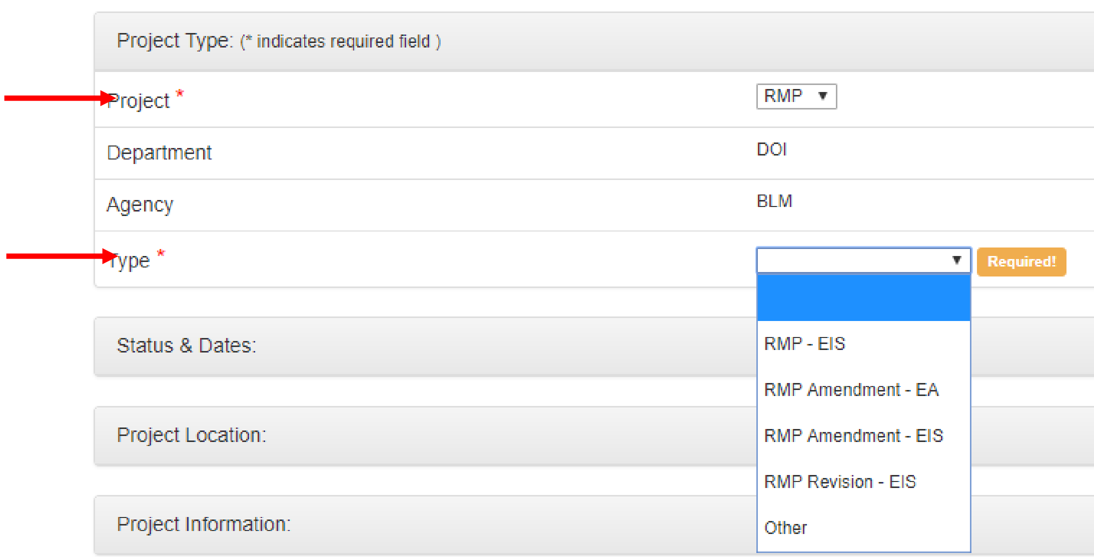


Figure 3.6

3.3.2.2 Status & Dates Field Group

When creating a new project the project status options will include all status options but will default to the **Preparation and Planning** status. Once you create the project and have a NEPA number assigned you update the status of your project as you move through the NEPA process in D2 using the **Edit** feature.

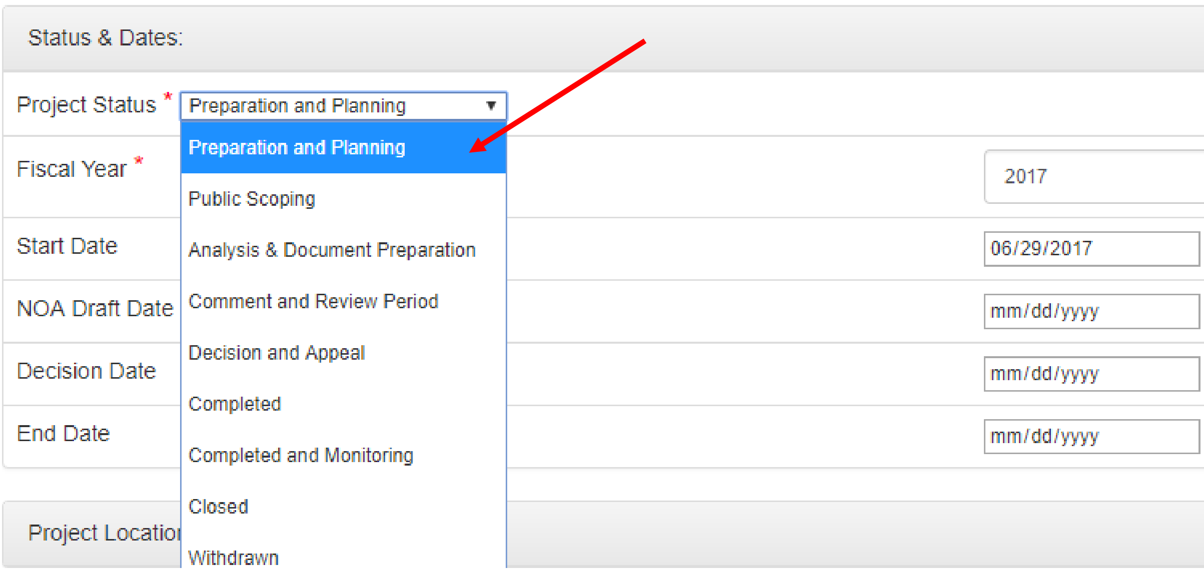


Figure 3.7

The date fields are all left blank (showing mm/dd/yyyy) and must be manually filled in during the project. There are two exceptions:

1. The Start Date is automatically filled in with the creation date. This date is modifiable at any time during the project.
2. The End Date will be filled in when the Project Status is set to one of the following status values; Completed, Completed and Monitoring, Withdrawn, and Closed.

3.3.2.3 Project Location Fields Group

Your NEPA number is generated based on the information you select in the State and Office Location fields. The NEPA number will not be shown until the project is saved. The NEPA number can be viewed by editing the project or looking at the project properties. You may select multiple States, Counties and office locations. However, you may only select one lead office, which will become part of your NEPA number, so choose carefully.

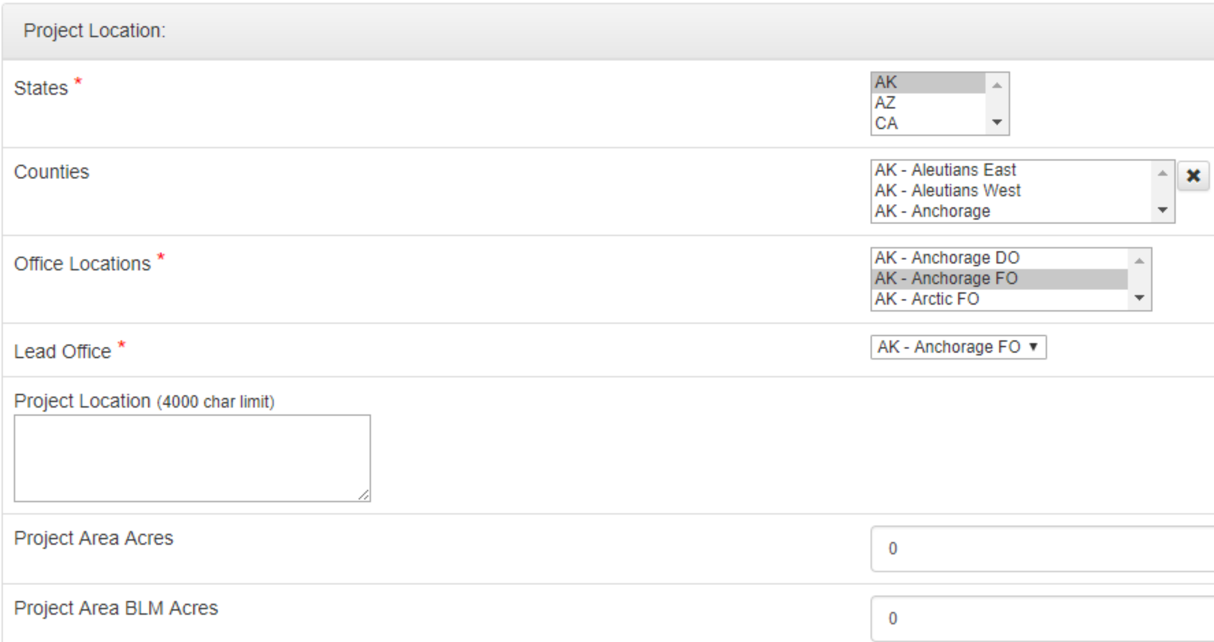


Figure 3.8

3.3.2.4 Project Information Fields Group

The next required field is the Project Name. This is the title of the project that will appear with the NEPA number on the NEPA Register.
The Project Description and Applicant Name fields are not required, but they are useful for providing more information about the project. The information in these fields will appear on a Project Summary Web Page**.**

The next **required fields** are the **Program**, **Sub Program** and **Monitoring Item**. When the Program is selected, the Sub Program options will be populated based on the Program selected. After selecting the Sub Program, the Monitoring Item options will be populated based on the Program and Sub Program selections.

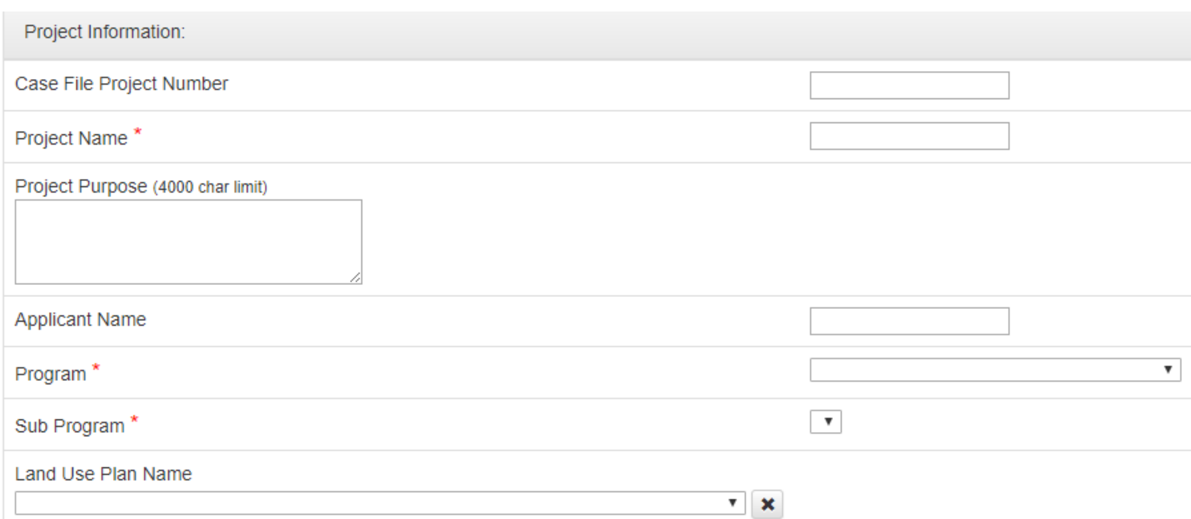


Figure 3.9

At the bottom of the Project Information group is the question regarding GRSG Habitat which is a **required field**. If the project is not within GRSC habitat leave the dropdown selection set to **No** and continue on to the next field group. This will disable the ability to expand the GRSG Habitat Monitoring Questions Field Group.

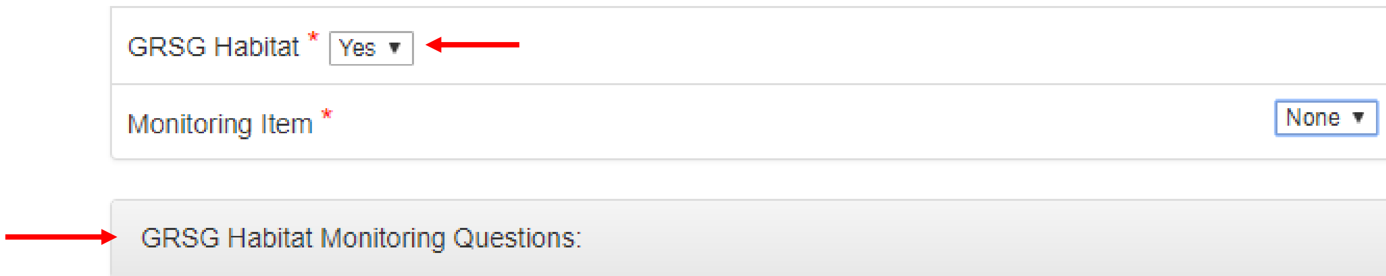


Figure 3.10

Answering no will take you to section 3.3.2.6 in this workbook.

3.3.2.5 GRSG Habitat Monitoring Questions Fields Group

If the project does occur within GRSC habitat select **Yes** from the dropdown menu in the Project Location Fields Group and designate the type of habitat from the **GRSC Habitat** menu.

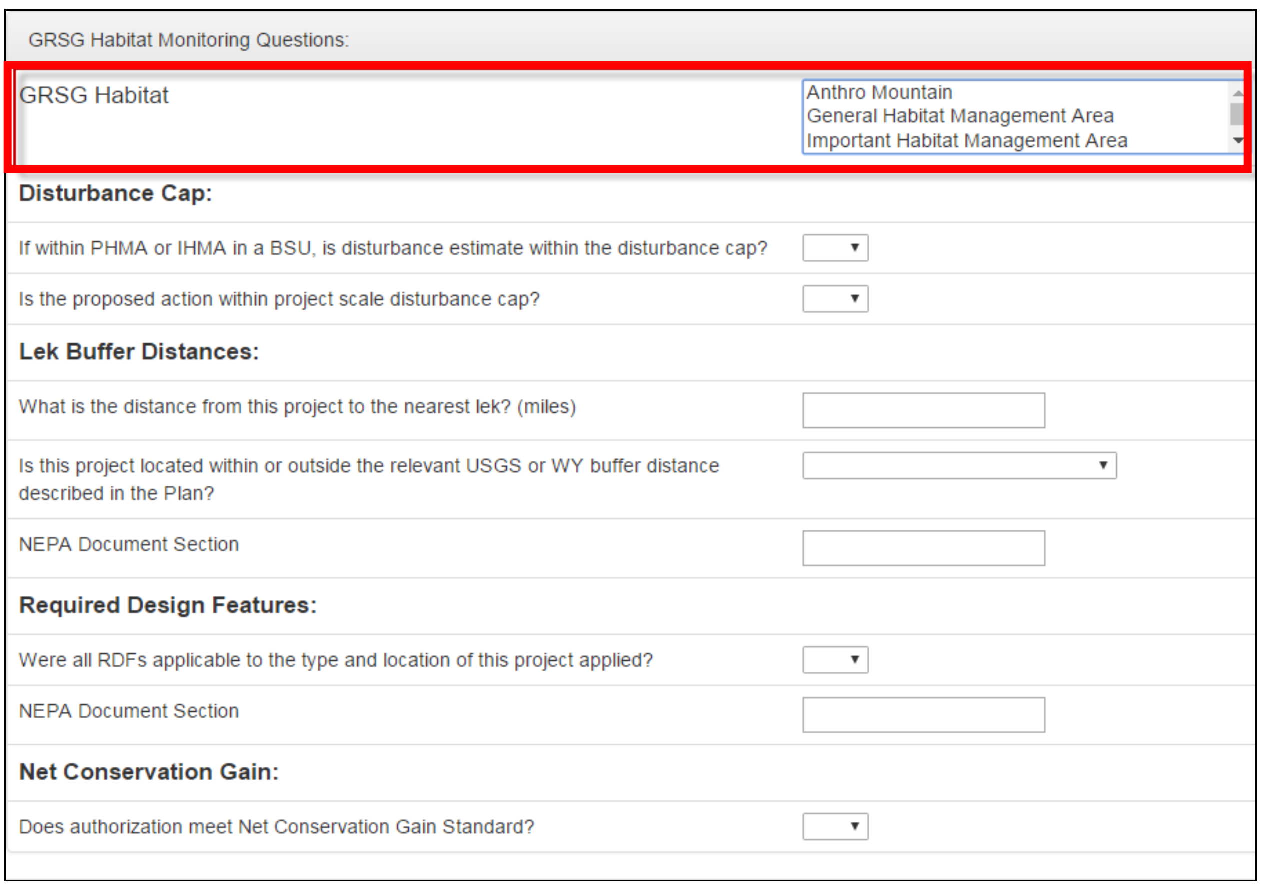


Figure 3.11

3.3.2.6 Document Template Fields Group

Document Templates are interactive document templates. The template options are based on the **Project Type** that was selected and at least one selection is required. In the example below a CX was used. The templates provided will only be in Microsoft Word format. One or more templates may be selected by using the CTRL and SHIFT keys.

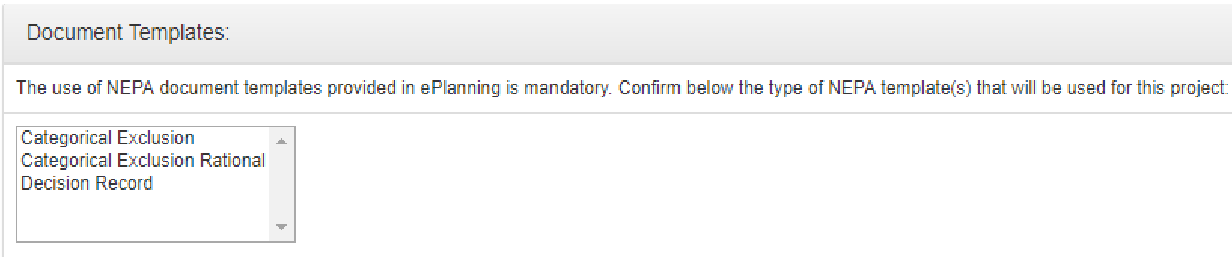
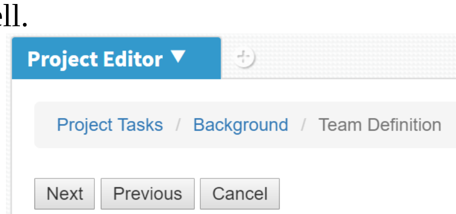


Figure 3.12

3.3.3 Team Definition

When all of the required fields have values in the Background task, the **Next** button will be enabled at the top right of the Project Editor Widget frame and a **Next** button at the bottom of the screen will activate as well.



Clicking on the **Next** button will refresh the Project Editor Widget frame, display an additional task at the top of the frame, display the Team Definition fields and disable the Next button.

When creating a new NEPA project, the person creating the project will automatically be added to the **Team Definition** as a **Project Team Lead** and **Public Affairs** (mandatory roles) with a **Discipline** of **P&EC**.Add team members by entering the first name and selecting from the drop down list. Once you add their role and discipline your team member will be automatically added to your project.

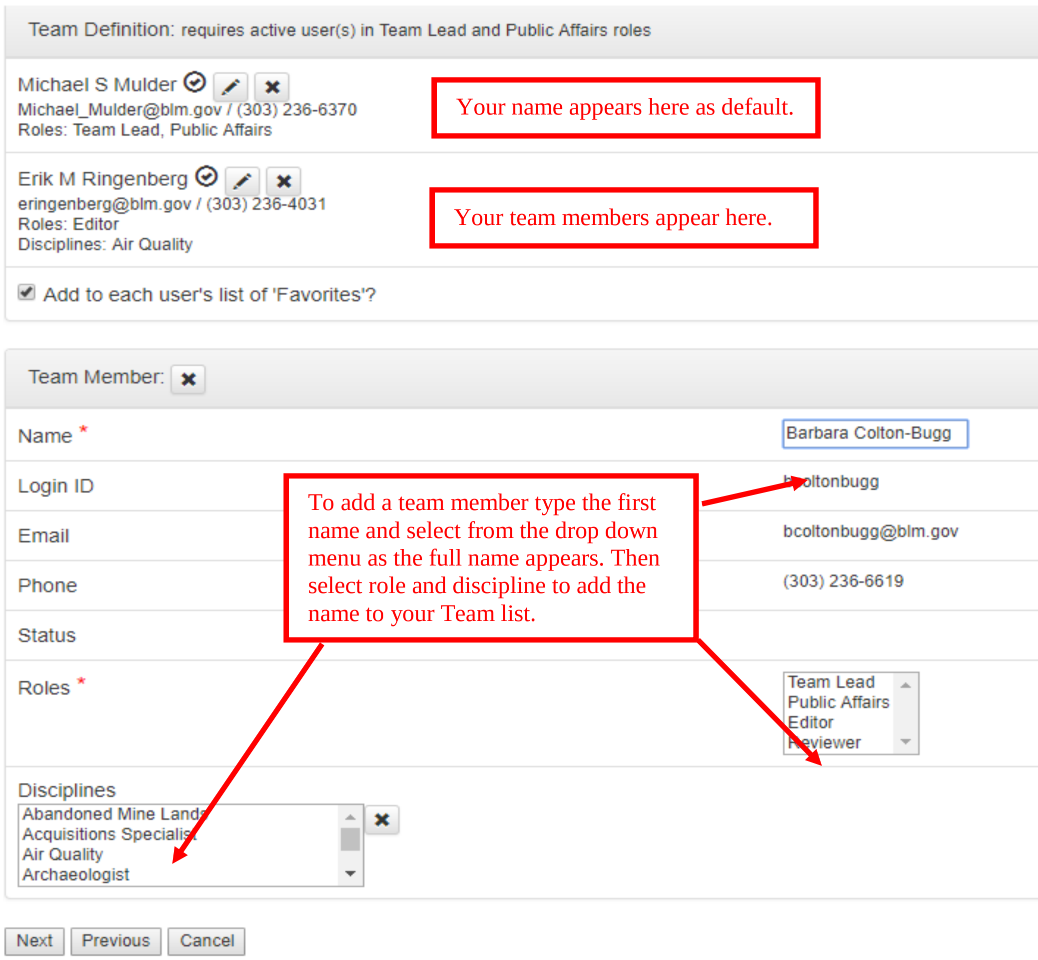


Figure 3.13

To **edit** a team member's role, click on the **pencil** mark next to the member on the right. To delete a Team meber click the "X" button

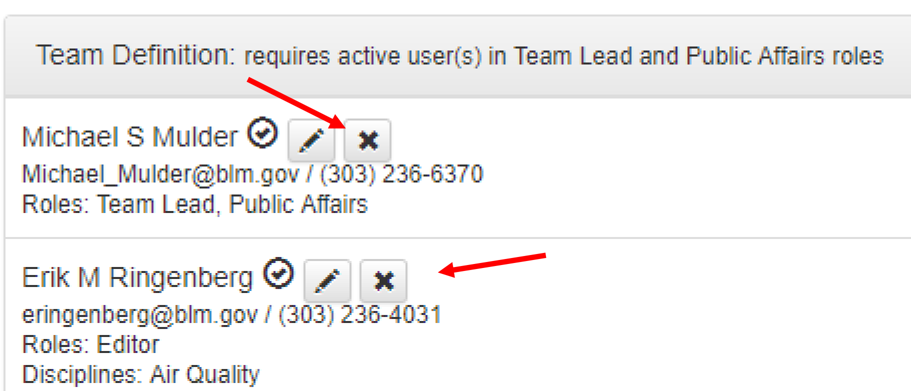


Figure 3.14

By creating one team member with the required roles, the **Next** button has been re-enabled. The default **Team Role** for the person creating the ePlanning Project will always be **NEPA Project Team Lead** and **Public Affairs** — do not delete these roles from the team member. Additional **roles** and **disciplines** can be added as needed. To add a role, simply hold the

CTRL key down and select the desired role. There is no limit on the number of roles or disciplines that a user can be assigned.

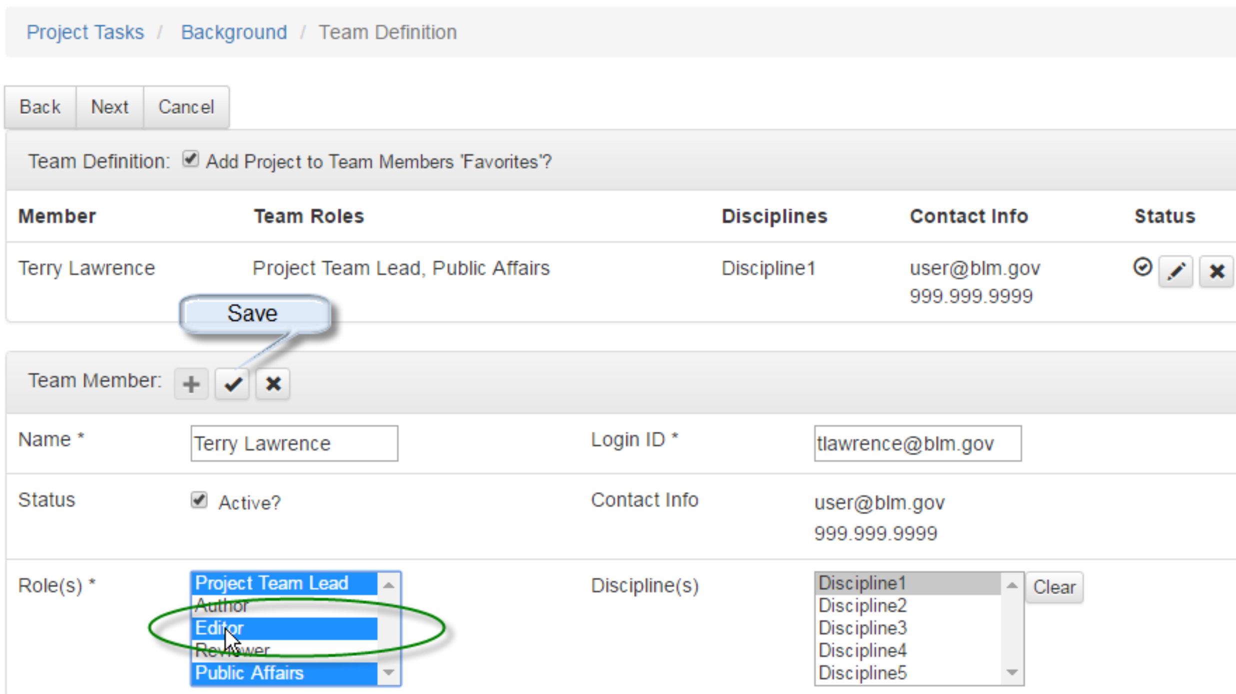


Figure 3.15

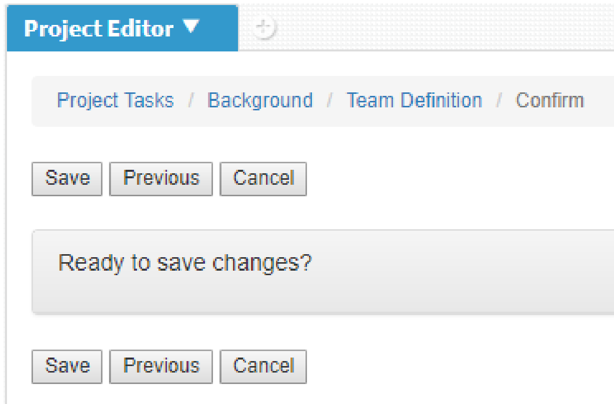
3.3.4 ePlanning User Roles and Permissions

ePlanning Role	Description
Project Team Lead	Role must be designated to create a project. Default role assigned when creating an ePlanning project This role can create, refresh and edit projects and web pages in Webtop and Back Office (BO).
Public Affairs	Role must be designated to create a project. Specific reviewer responsible for reviewing and approving web pages in Back Office prior to publishing to the NEPA register.
Editor	Edits documents within ePlanning. Can view and edit projects in D2.
Reviewer	Read only role to review document content. Can view projects in D2, and has no BO access.

Figure 3.16

When all of the required fields in the **Background** and the **Team Definition** tab have been completed, click on the **Next** button at the upper left of the frame. If any required fields have not been completed the **Next** button will not be enabled.

The last screen of the project creation process is displayed and the user is allowed to return to previous tasks in the process, if needed. As noted before the **Previous** button can be clicked or the task links at the top left of the frame can be clicked.



Fugure 3.18

If a problem has been discovered during the project creation process and the project needs to be removed, click on the **Cancel** button. During the project editing process, clicking the **Cancel** button will not save any changes that have been made. This is true at any point in the project creation and editing processes.

If all of the needed information has been entered, the project can be saved by clicking on the **Save** button.

Upon saving the project, the frame will show that the project has been saved and all of the task links at the top left of the frame are removed. Clicking on the **Ok** button will return the user back to the Project Editor Widget initial screen, allowing for the creation or editing of a project.

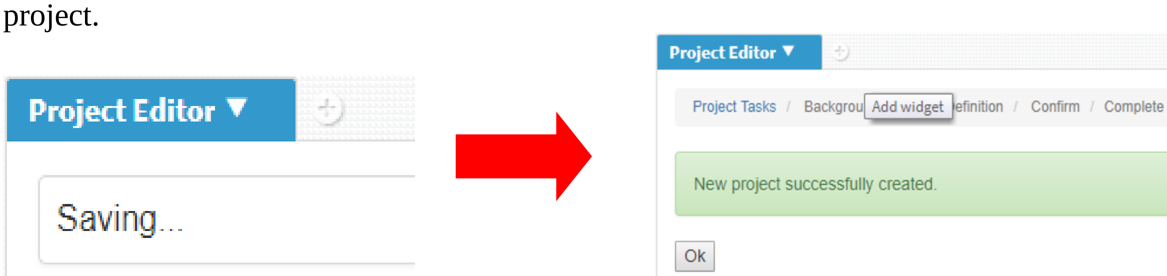


Figure 3.19

Once a project has been saved during the project creation process you may find it by collapsing the **Project Editor** and going to your **Favorites** Widget on the main screen.

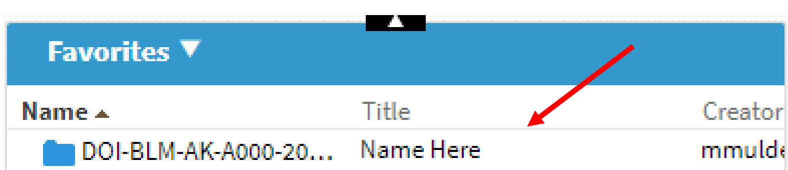


Figure 3.20

3.4 Locating a Project in D2

There are two methods of locating projects in D2; via the Favorites Widget and the ePlanning

Project Cabinet folder in the Repository browser Widget.

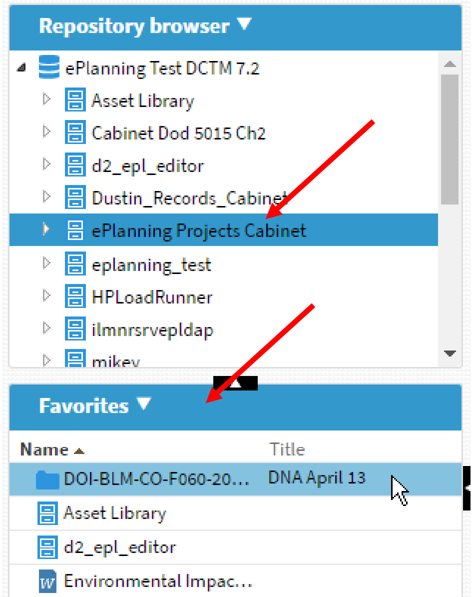


Figure 3.21

The **Favorites** Widget list will show any projects, among other objects, that either the user has created or has been selected for the Favorites list. This could occur when a user is added to a project team or the user navigated to the project and the select the **Add to Favorites** option from the context menu when right clicking on the project id number.
Clicking on the project from the **Favorites** Widget will result project information being displayed in the **Document list** Widget, including documents and other associated objects.

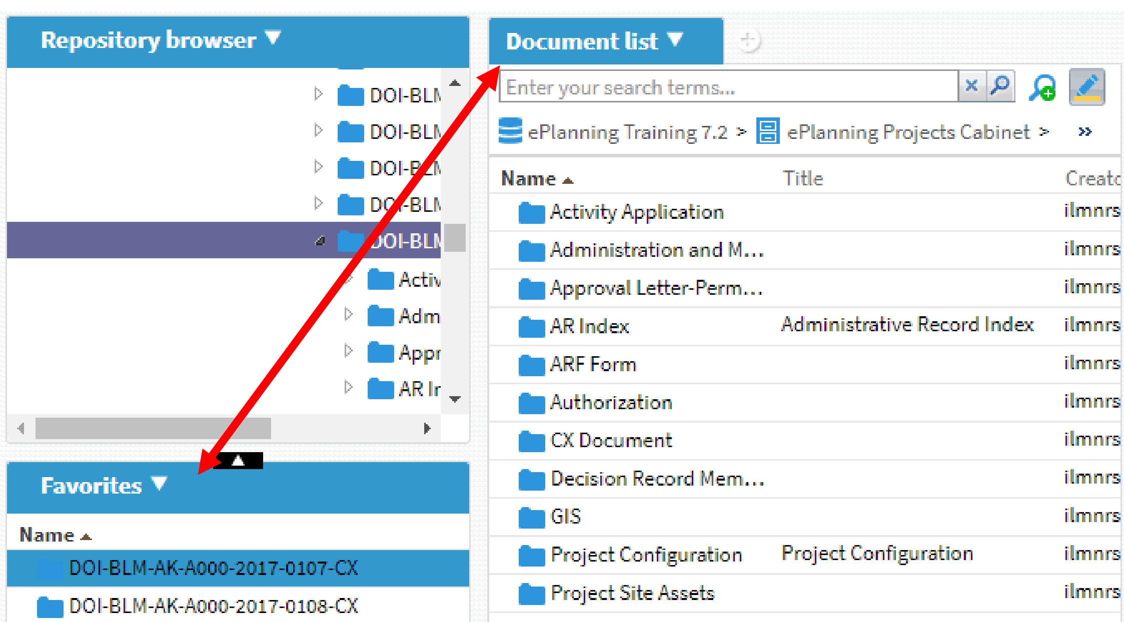


Figure 3.22

The second method of locating a project in D2 is via the Repository browser and the **ePlanning Projects Cabinet** folder listed within.

To locate a project in the **ePlanning Projects Cabinet** folder, expand by clicking the arrow next to each of the following nodes:

- **ePlanning Projects Cabinet**>> **DOI**>> **BLM**>> **State Projects**
- Continue down to the **state**>> **office**>> **year**>> **project type**.

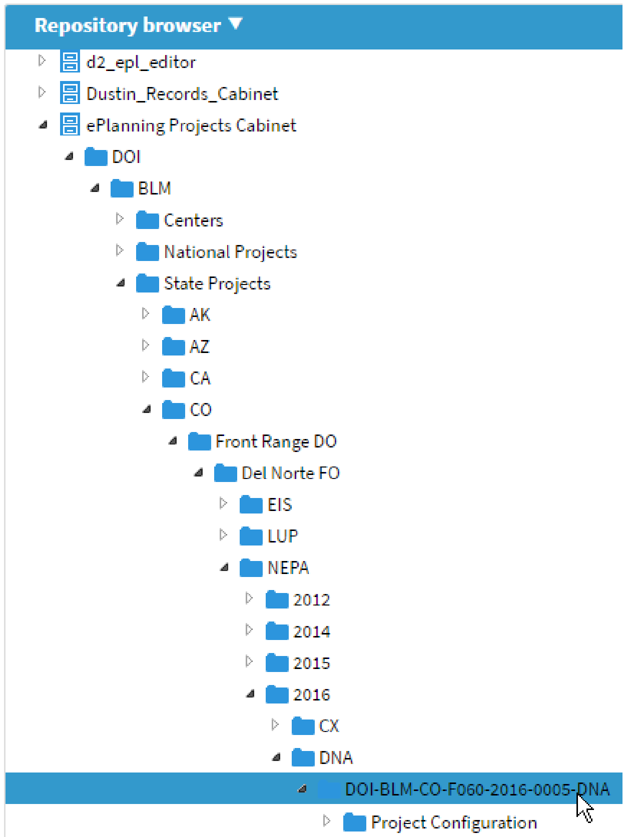


Figure 3.23

Left clicking on a folder, (for example, click on the **DOI folder**) will display the contents of the folder in the **Document list** Widget frame.

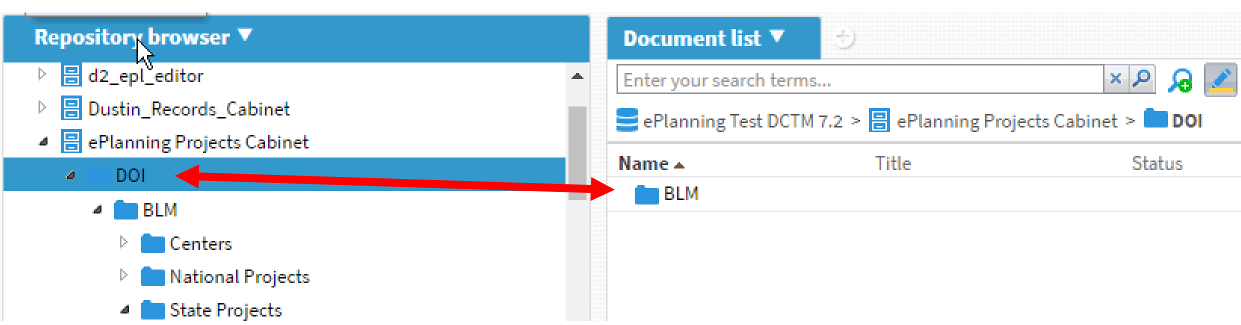


Figure 3.24

To create a **shortcut** to a project under the **Favorites** Widget check the is **Add Project to Team Members "Favorites"** box located on the **Team Definition** tab, as demonstrated below, or select the **Add to favorites** menu option after right clicking on the project id in the Document list Widget.

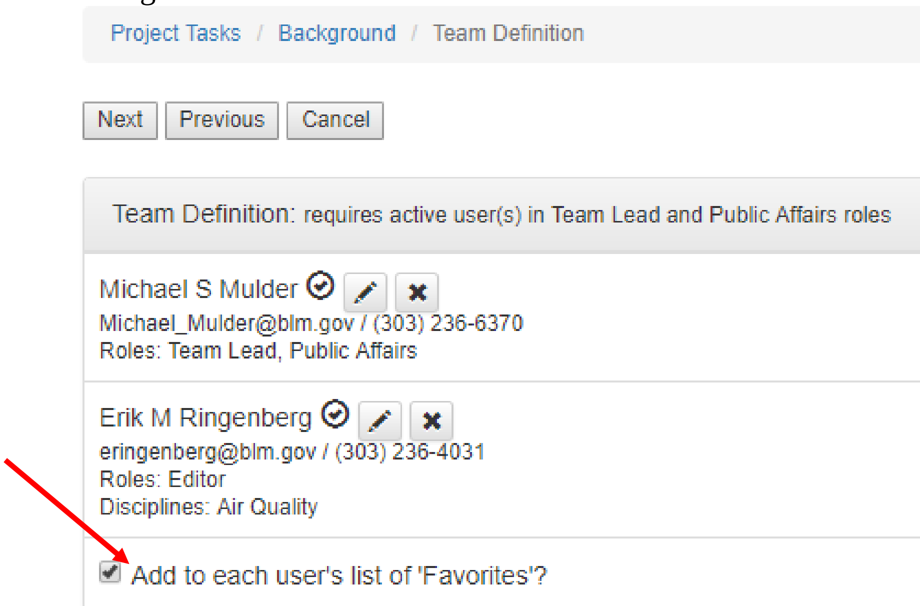


Figure 3.25

To add the project to the **Favorites** Widget list, first locate the project in the **ePlanning Planning Projects** folder. Be sure to click on the Project Type folder (in this example: DNA) so that the project is listed in the Documents list Widget. Right click on the project in the Documents List Widget that you would like to shortcut to the **Favorites** Widget list and select **Add to favorites** from the drop down menu.

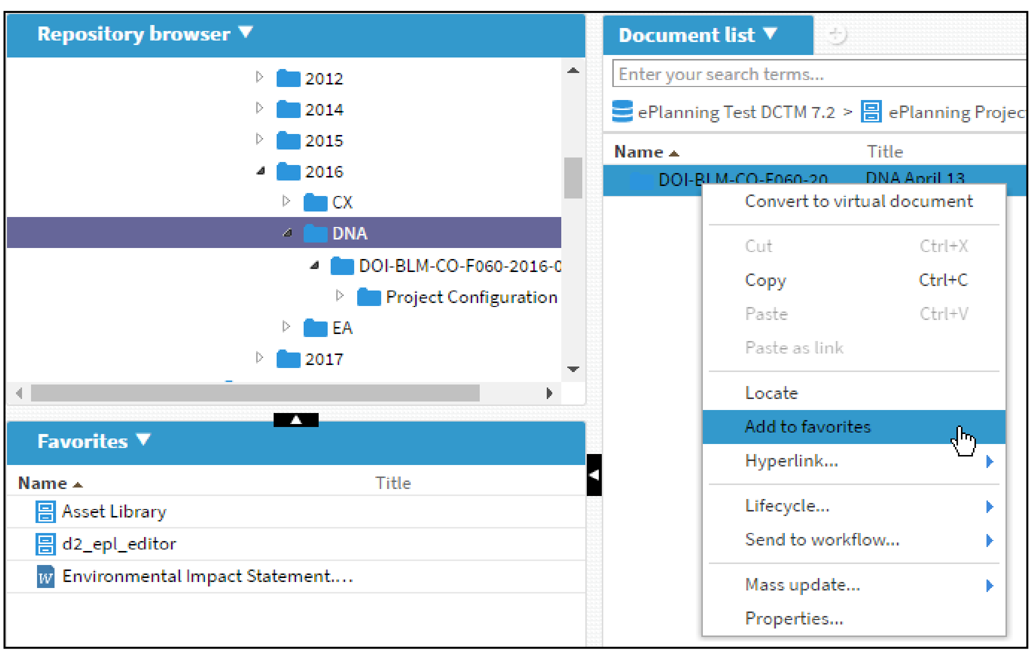


Figure 3.26

Over time, a large number of projects might populate the **Favorites** Widget list. Unsubscribe from projects to minimize the number of projects that are listed under the **Favorites** Widget list. **Remove** an item by right clicking on the object in the list and select the **Remove from favorites** option from the context sensitive menu. Removing a project from the **Favorites** Widget list does not delete the project, the project will always reside in the ePlanning Planning Projects folder.

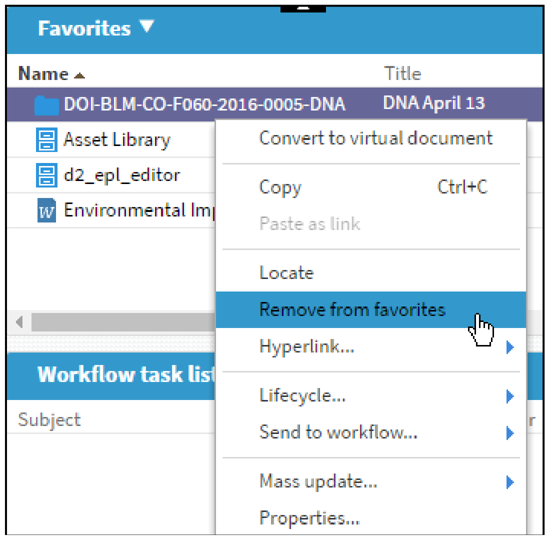


Figure 3.27

3.5 Editing Project Information in D2

To **edit** project information in D2 locate the project, either in the **ePlanning Projects Cabinet** folder or the **Favorites** Widget list. Open or click on the Project Editor Widget and then click on the Edit Project button.

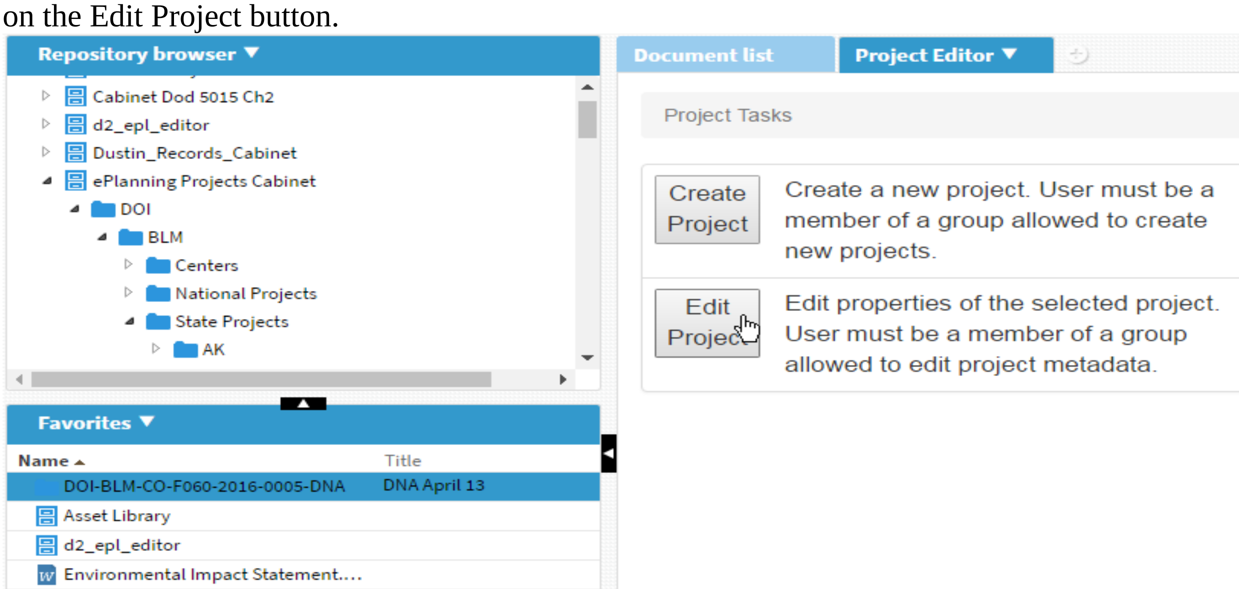


Figure 3.28

Any of the information fields in the **Project Editor** Widget can be changed or updated at any time. As the project moves through the NEPA process, come back into D2 and update the information as needed to keep the project information relevant and up-to-date. Please see the previous sections in this chapter on editing information in the Create Project section. Do not forget to update your project status as you edit information on your project. From this widget any of the information fields in any of the project tasks can be changed or updated *with the exception of changing the project type*.

To preserve the numbering sequence within D2, ePlanning users are not able to **Delete** projects. To request a project be deleted, submit a Remedy Ticket.

Chapter 4. Assigning Tasks

4.1. Introduction

In this chapter you will become familiar with the assigning tasks function. At this point, you have created the project and team members have been assigned to the overall project. Before the Interdisciplinary Team (IDT) members can actually jump in and start working, the next steps in the process are to assign specific sections of the documents to the team members.

4.1.1. Objectives

This chapter will show you how to assign tasks in ePlanning. Upon completion of this chapter, you will be able to do the following:

- Explain some new terms
- Explain the basic ideas behind Virtual Documents
- Assign Authoring Tasks to IDT members
- Navigate and complete sections you have been assigned
- **Edit** a document or section of a document
- **Check In** a document or document section
- Copy a template from the Asset Library

4.1.2. New Terms

Edit: Checks out and locks the selected document and related descendents, or subsections out of the content management system, and opens the document for editing.

Check In: Uploads the selected document and subsections back into the repository and unlocks them so that other users can edit them. If you do not check in a document, your changes will not be recorded in the repository and other users will be unable to make edits to your.

Cancel Checkout: Releases the lock on a document and cancels the checkout without uploading any edits or changes that may have been made to the document in the user's Checkout folder. Added or changed information will be lost.

4.2. Overview on Virtual Documents

A **Virtual Document** is a document that includes one or more components structured in an outline format. A component may be another virtual document or a simple document. Virtual documents can have any number of components nested as far as you want it to go.These documents are automatically generated when you download your templates.

A virtual document allows multiple contributors to add and modify content belonging to a single, larger document structure. One of the main benefits of virtual documents is the advantage of content re-use.

An example of a virtual EA document is shown below:

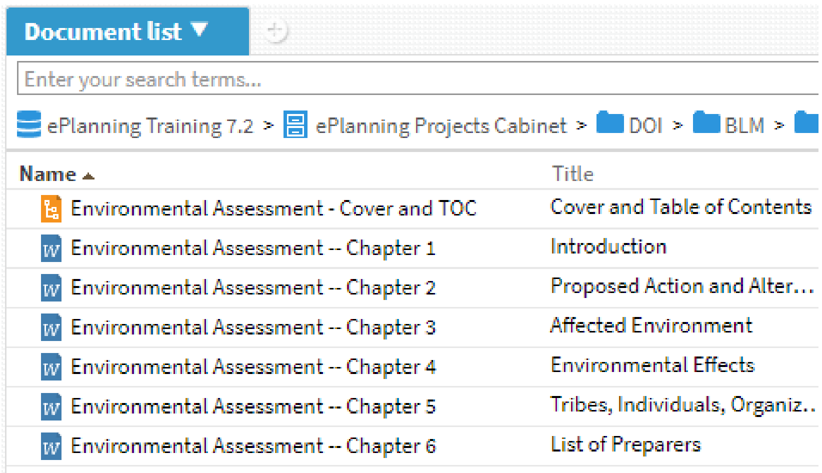


Figure 4.1

4.3 Assigning Authoring Tasks

Here are the step-by-step directions for assigning sections of a document to your team:

1. Navigate to the project's virtual document and document sections.
2. Right-Click on the document section you want to assign and click on "**Send mail…**"

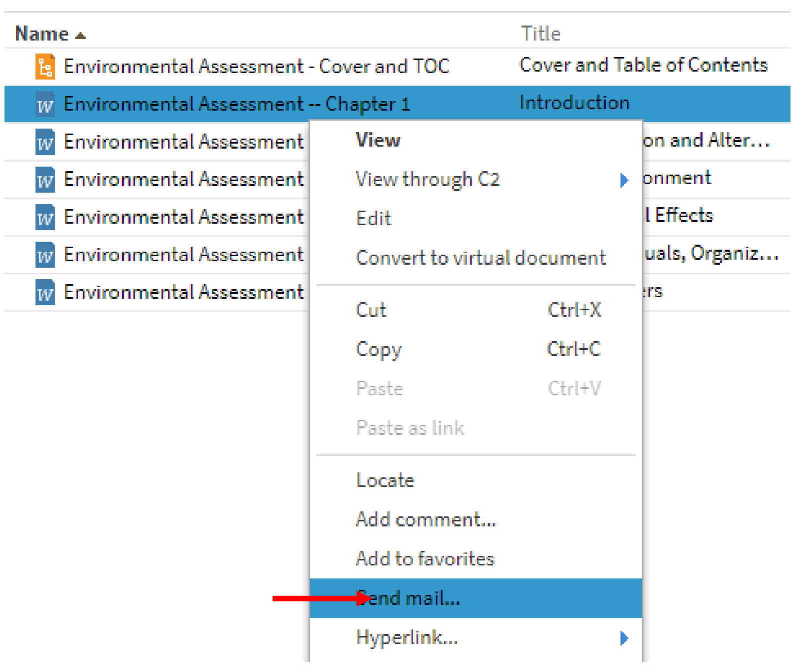


Figure 4.2

3. An email assignment screen will appear. Click on the . . . next to the "to:" box.

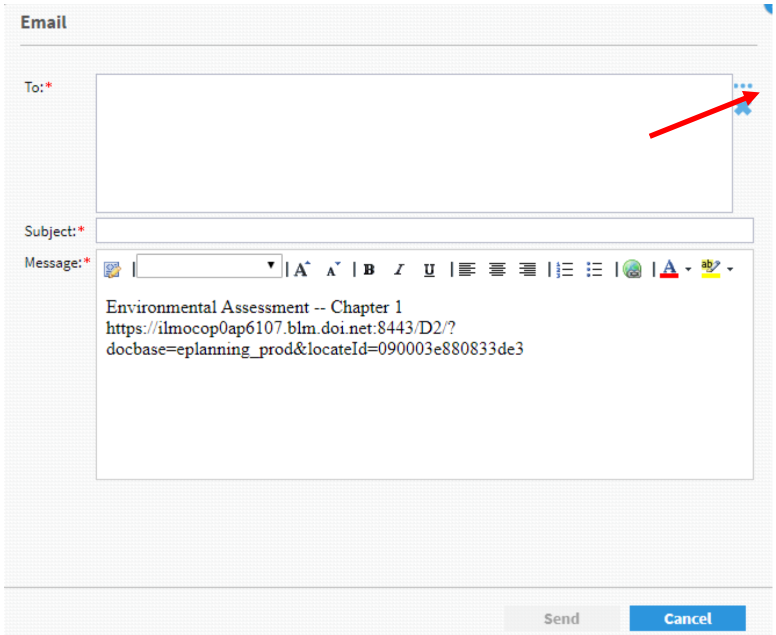


Figure 4.3

4. Enter the first name of the person you wish to assign the task to. A name menu will appear where you can select the name as you typing. Once the name appears click on the name and then click on over arrow to send it to the **Selection** list. Add as many team members as needed by repeating the process. Click OK when complete.

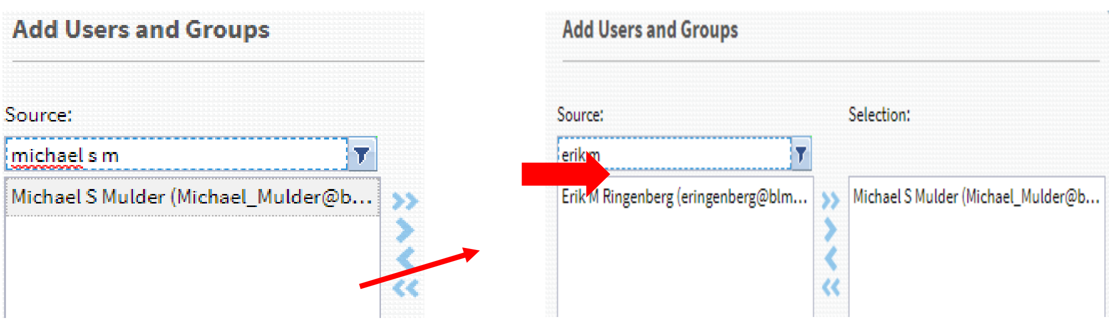


Figure 4.4

5. Enter the subject and any message you want to include with your task assignment and then click the **Send** button.

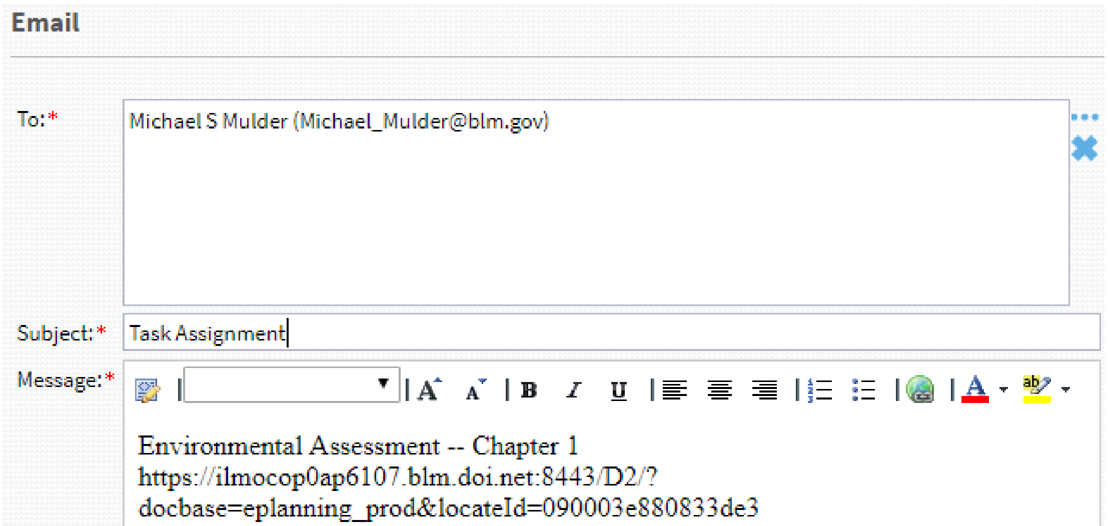


Figure 4.5

6. The person assigned the task will receive an email.When they click the link, they will log into D2 and be taken directly to their assigned task.

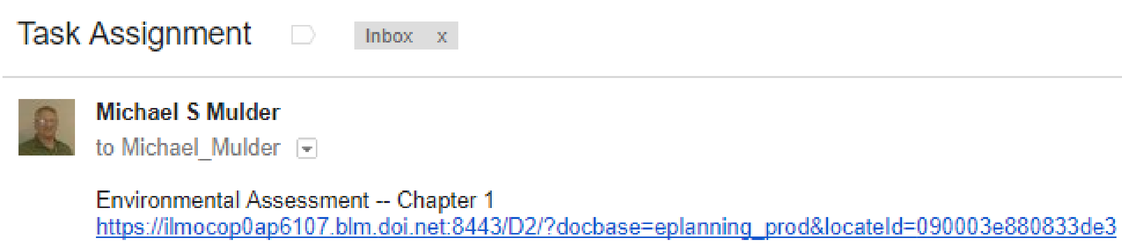


Figure 4.6

4.4 Navigate To and Completing Task Assignments

Task Assignments are sent to members via email. Your emailed assignment will look something like example:

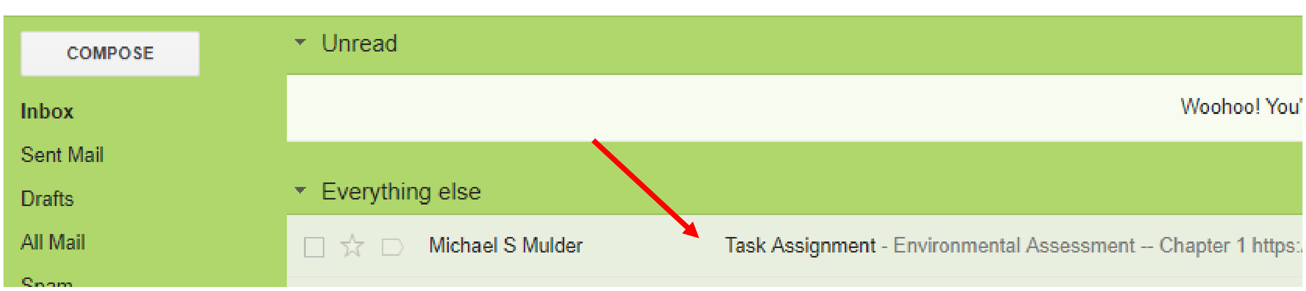


Figure 4.7

When you open the email you will see a link that will take you to the login screen and then take you directly to your assignment in D2 after you sign in.

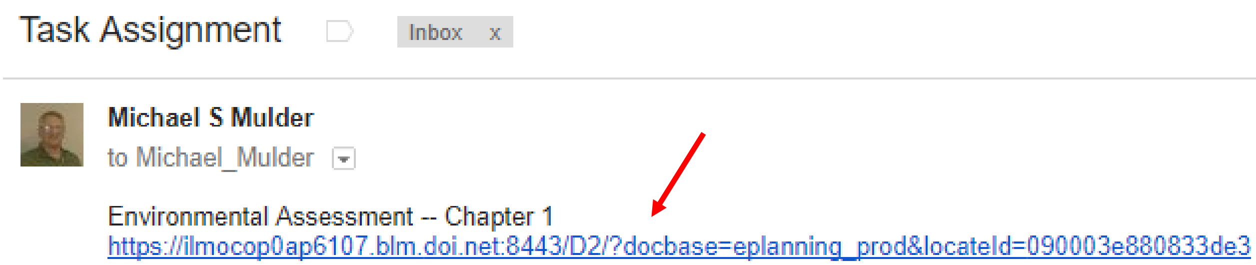


Figure 4.8

4.4.1. Opening and Completing Assigned Tasks

After you sign in you will be taken to your assignment in the **Document list**.

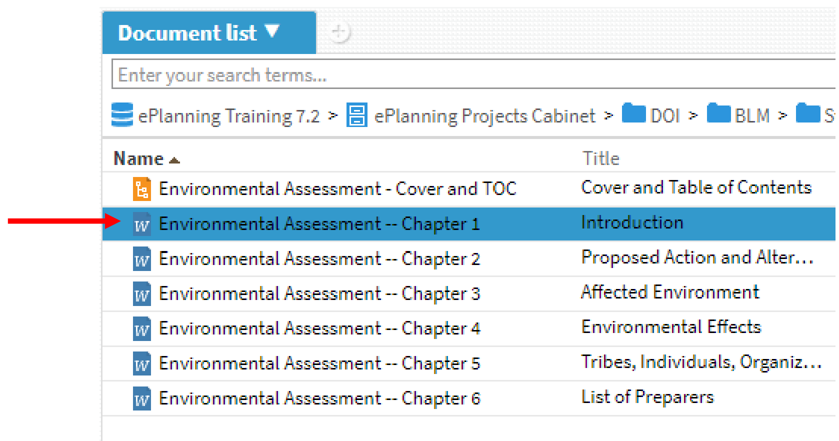


Figure 4.9

Right click on the document segment and select edit to open it for editing.

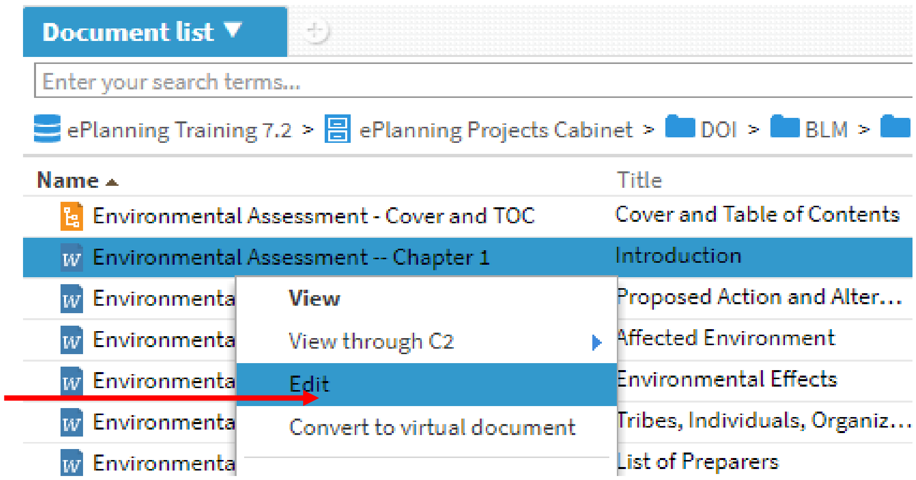


Figure 4.10

A **Green Padlock** will appear next to your document segment and your document segment will appear at the bottom left of the screen. Your document is now officially locked and **checked out**. Nobody may edit your document segment until you do a **check in**. Open your document segment by clicking on *docx* block.

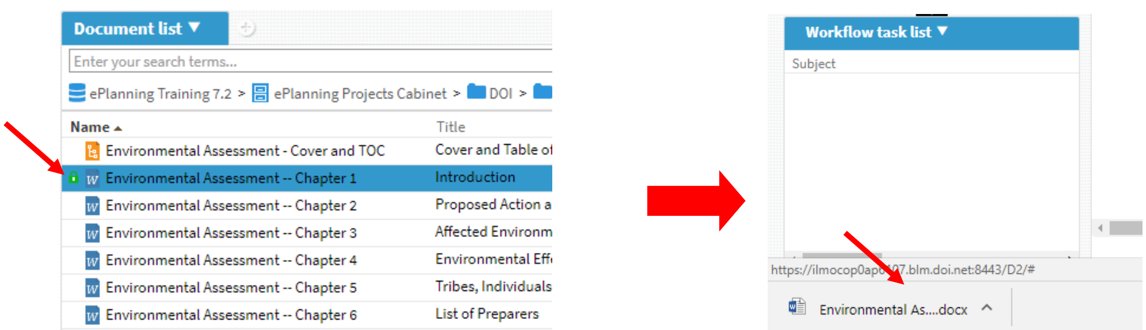


Figure 4.11

Your document segment will open in Word. Complete your sections and save the document segment to your computer or desktop.

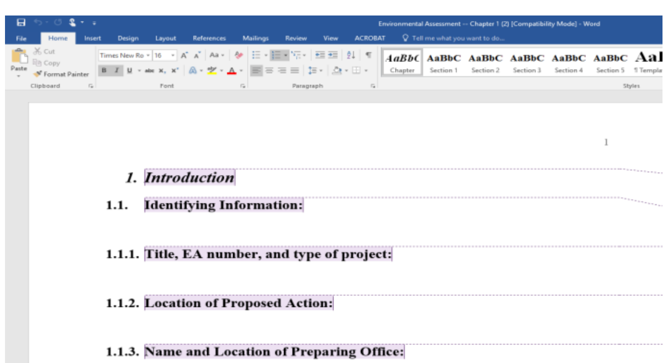


Figure 4.12

Once you save your document segment close out of it.

To check in your document go back to your document list and right click on the document you locked out and select **Check in…**

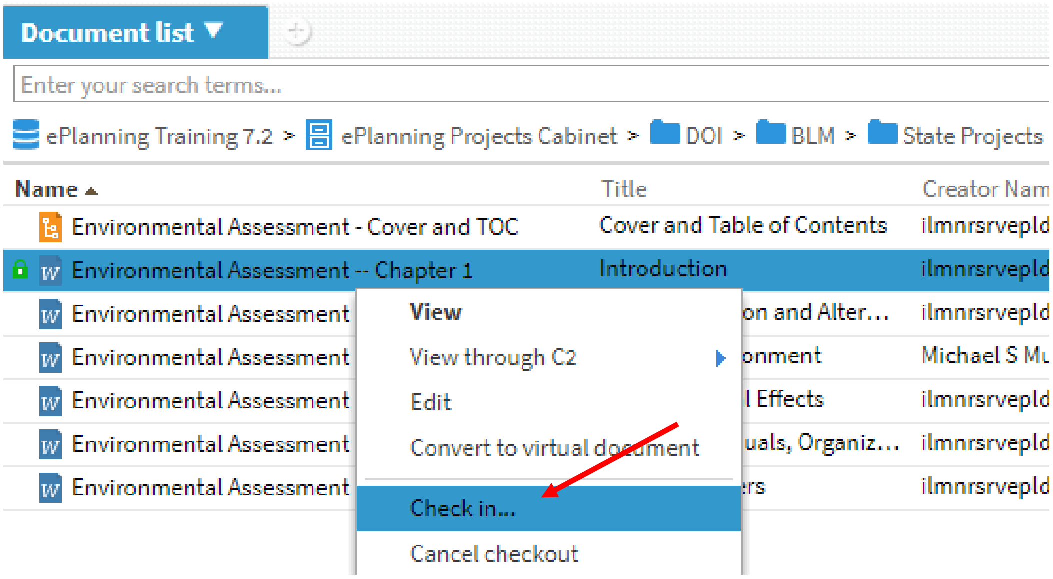


Figure 4.13

The check in screen will activate. Select the Options tab and then click the **. . .** next to the **Check-in from file box**, then select your document segment and click **Open** and click **OK**. Note: your fields will autofill, do not make any changes.

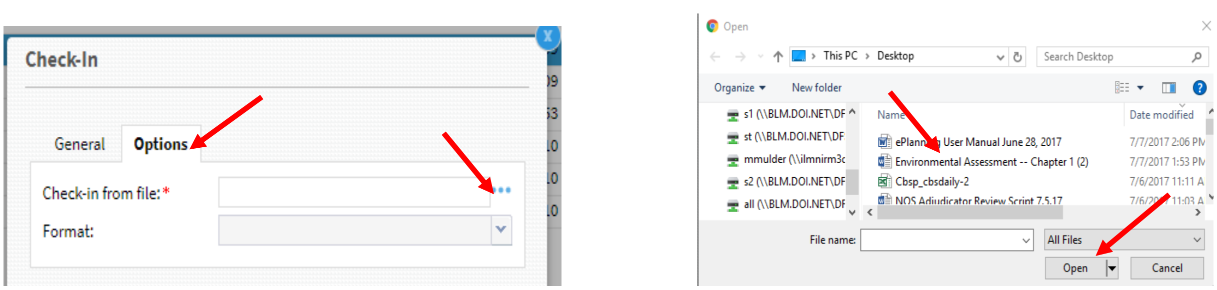


Figure 4.14

You will see a brief transfer message flash on the screen and the green padlock will disappear. Your document is now checked back in.

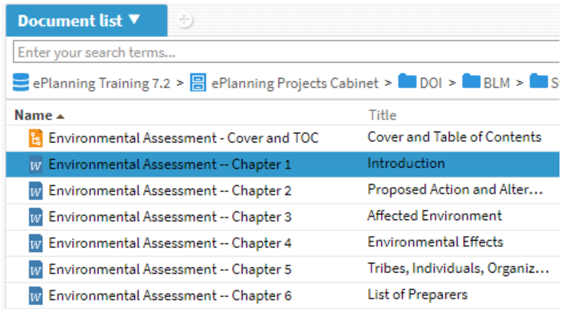


Figure 4.15

4.6.1. Copying and Pasting a Template from the Asset Library

You may have not loaded all the templates you need for your project. The **Asset Library** is a cabinet located in the ePlanning system that is used to store document templates. From the library you may copy and paste templates into your document folders.

Here are the step-by-step directions for copying a template into your project folder:

1. In the Repository browser, expand the following folders: **Asset Library / Document Templates / Standard Word Templates**.
2. Click on the folder that contains the template you need and the contents will be displayed in the document list.

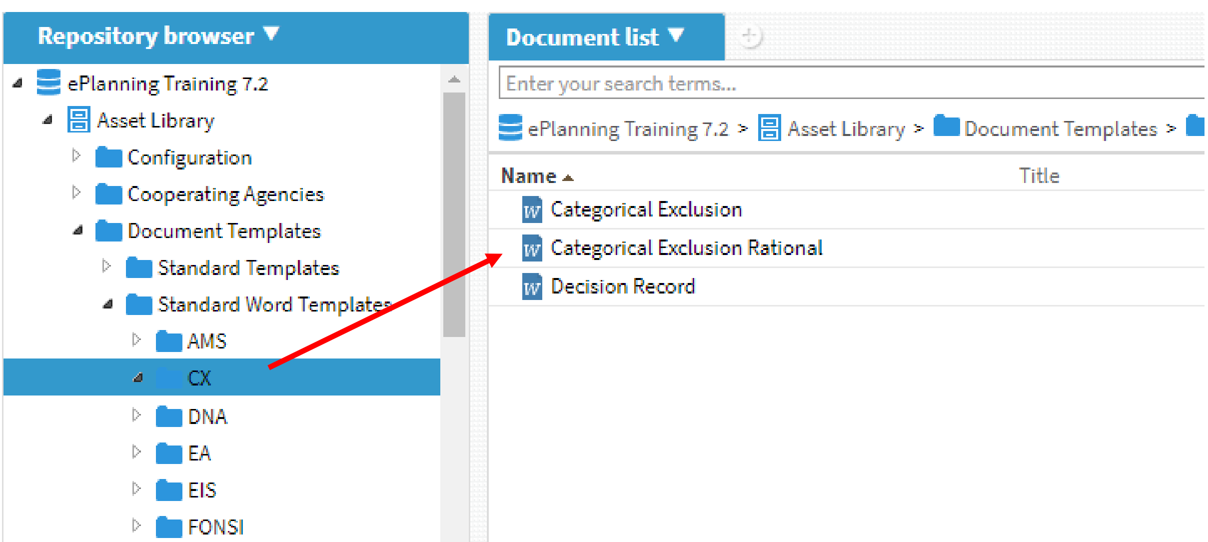


Figure 4.16

3. Navigate to the location of the NEPA document template and right click on the document and click copy.

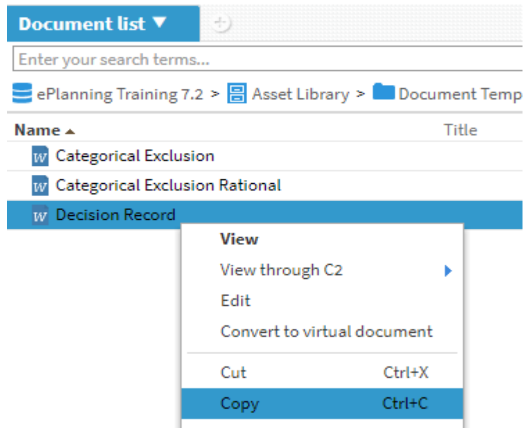


Figure 4.17

4. Navigate to your **Favorites** and select your project. Now click on your project folder to reveal your folders and locate the folder in the **Documents list** where you want to paste your template. In this case the **Decision Record Memorandum** folder.

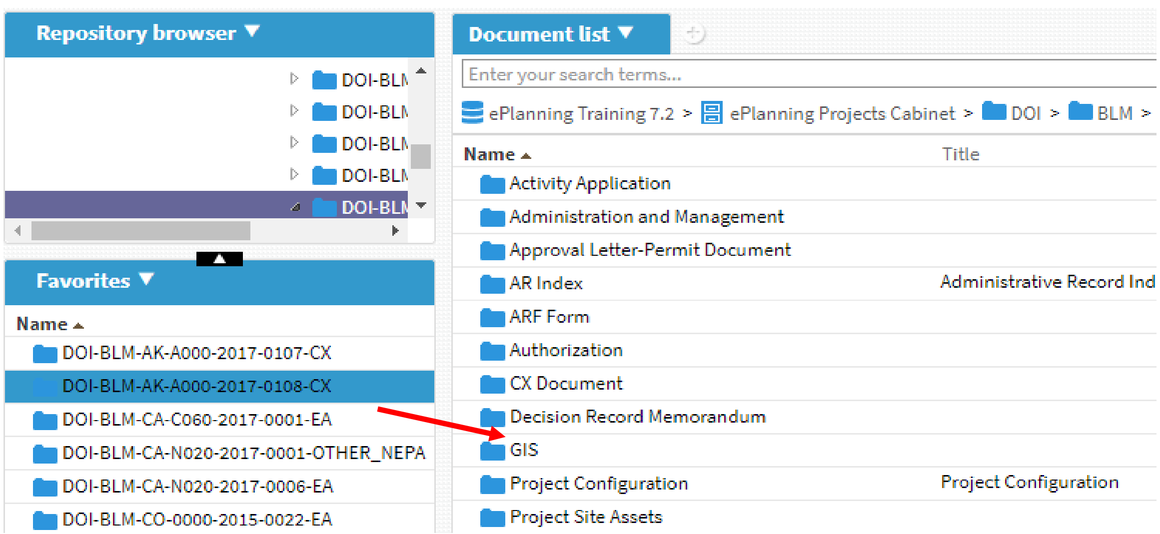


Figure 4.18

5. Right click on the folder where you want your document and select **Paste** and your document template is now located inside your folder when you open it in your **Document list**.

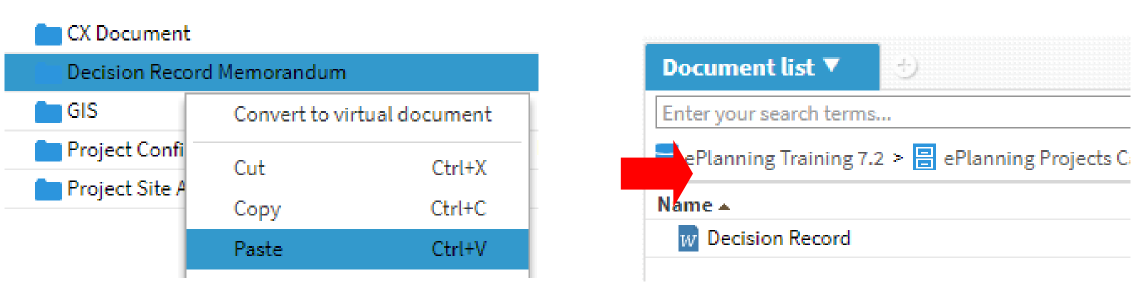


Figure 4.19

Now your document template is ready for use.

Chapter 5. Documents in D2

5.1 Introduction

When a team lead has completed the project setup and sent task assignments, the next step of the ePlanning process will be completing the documents for review. After review a website can be created to display the project for public viewing. This chapter will show you how to add your document(s) to your project folder for review and create document builds that are 508 compliant.

5.1.1 Objectives

Upon completion of this chapter, you will be able to:

- Prepare a document for review.
- Add additional documents and file folders to your project folder.

5.2 Prepare a Document for Review

Now that you know how to open a template for editing here are some ways you as a team lead can prepare your document for review.

1. Turn on track changes in the template. The reviewer will need an ePlanning account for this option.

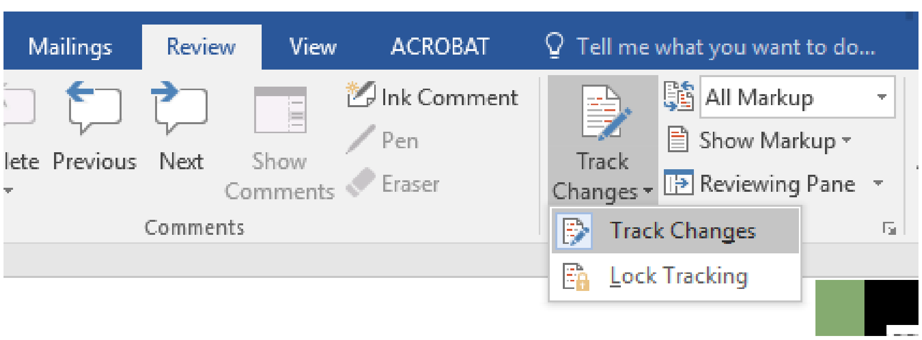


Figure 5.1

2. Create a PDF copy of your document and enable it for editing. You can then save it to your desktop and email it. No need for an ePlanning account.

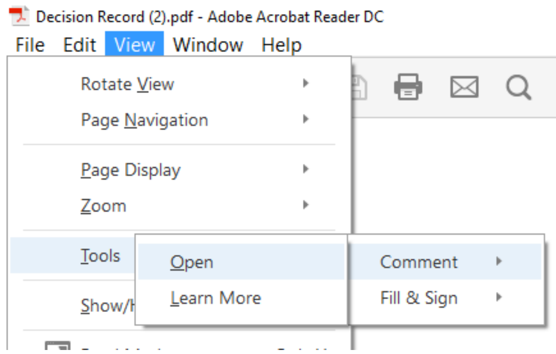


Figure 5.2

3. Add the person reviewing your document to your project as a **reviewer** and email the document link to them (see chapter 2). They will need an ePlanning account for this option.

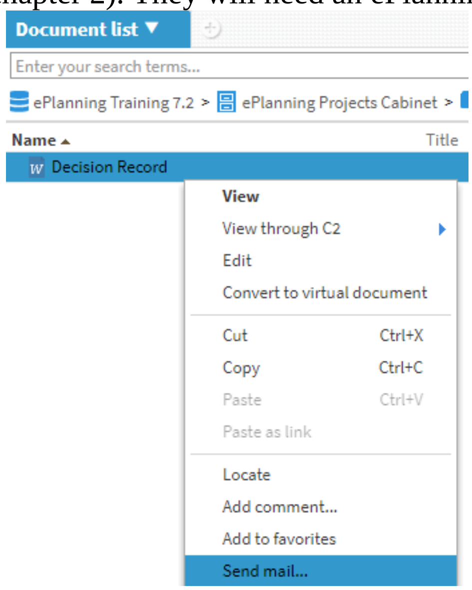


Figure 5.3

4. Save your document as a Word document to your computer and send it to the reviewer or share it to a specific drive for editing. The reviewers will not need an ePlanning account for this option.

These are several ways you can send your document for review. Remember to save a copy of the review documents in your project folder for your administrative record.

5.3 Add Other Documents and File Folders

There are times when you will need to add or save other documents such as memorandums, emails, maps, meeting notes, press releases or other important documents you want to post to the public or support the decision.

5.3.1 Adding Documents

One of the easiest ways is to simply click and drag your document to the project folder. Open the file folder to reveal what is inside it in this case, a blank file. Then open your File Explorer and click and drag whatever documents into the Document list area.

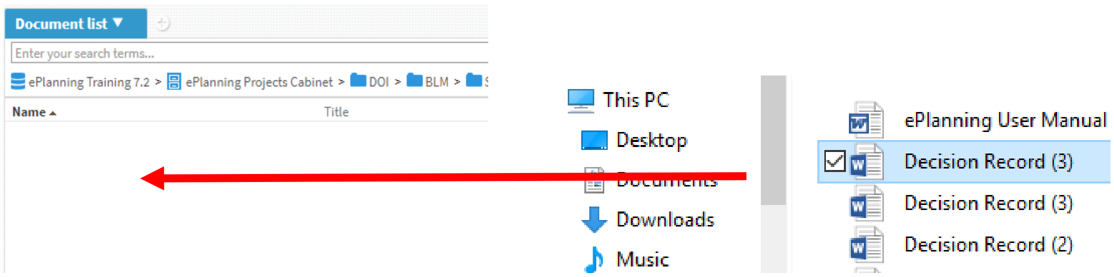


Figure 5.4

You may also add a document to your file folder by clicking the import function at the upper left cornor of you screen. Start by selecting the file folder you want to import the document(s) to and then click on **IMPORT** function.

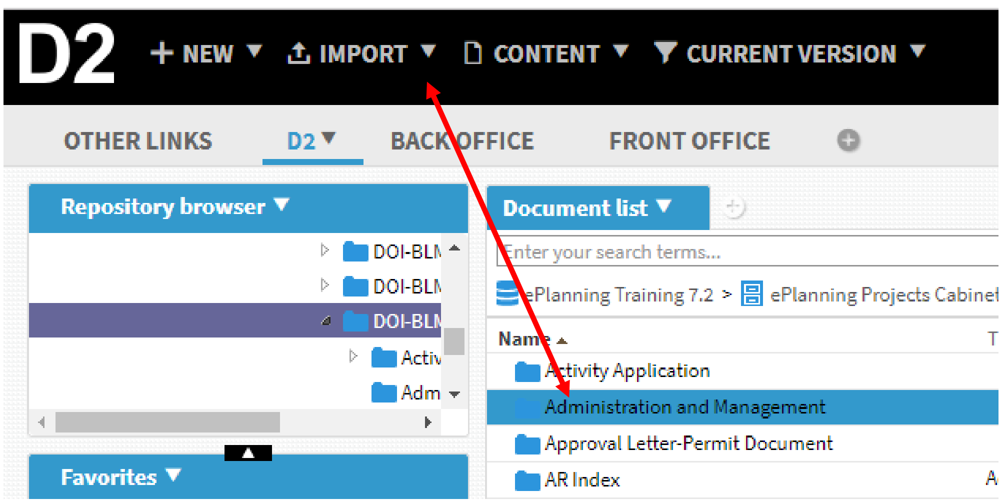
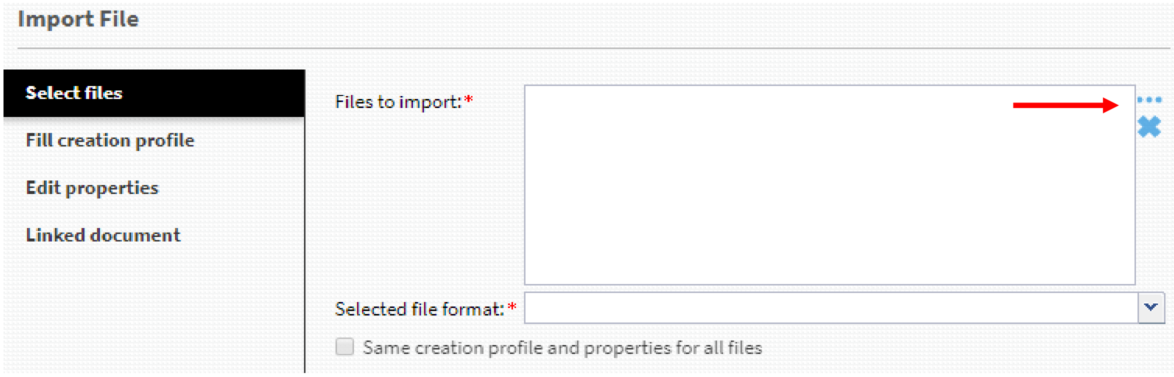


Figure 5.5

Select **File**… and then start completing the required information in the **Import File** screens. In the Select files screen click on the … to import your documents. Complete the remaining screens by accepting defaults and clicking the **Next** button until your document is transferred into your project folder.



5.3.2 Adding File Folders

You may add a file folder to your project by clicking on your project folder in Favorites and then click on **NEW** in the upper left hand side of your screen.

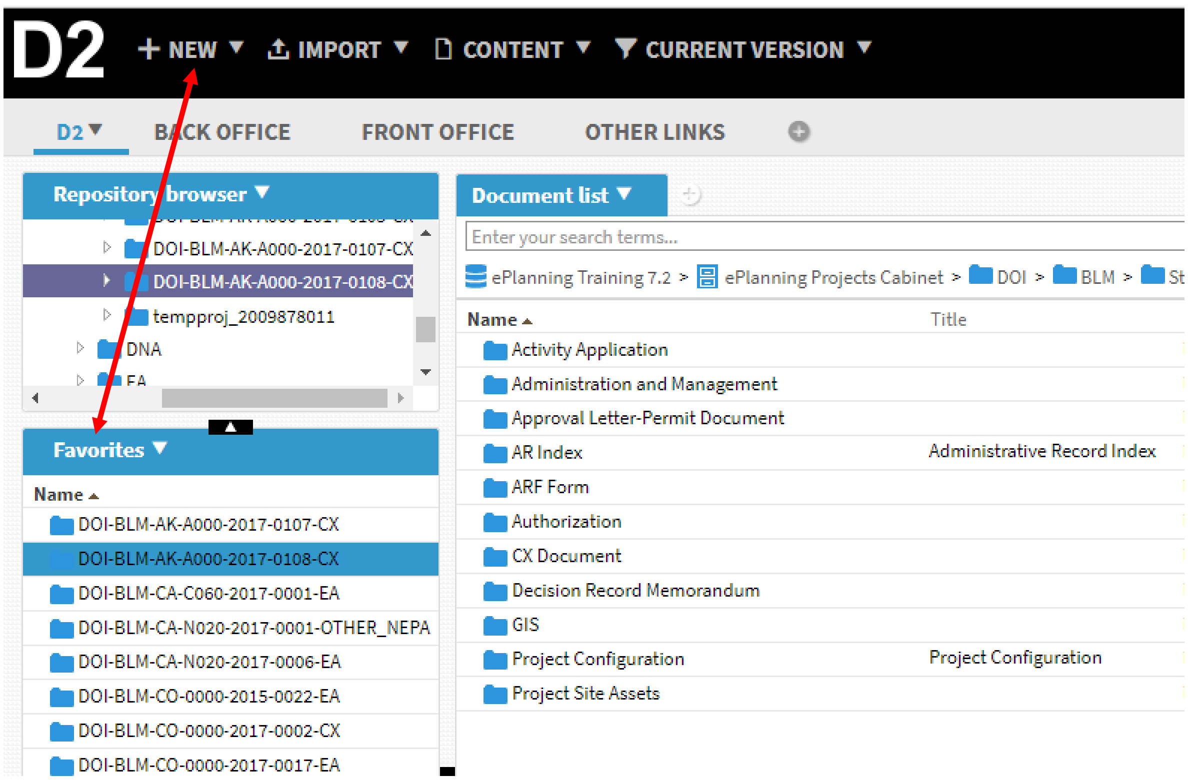


Figure 5.7

Select Folder from the drop down list. Click OK for Folder (dm_folder), the default. Give your File folder a name in the properties screen and click OK.

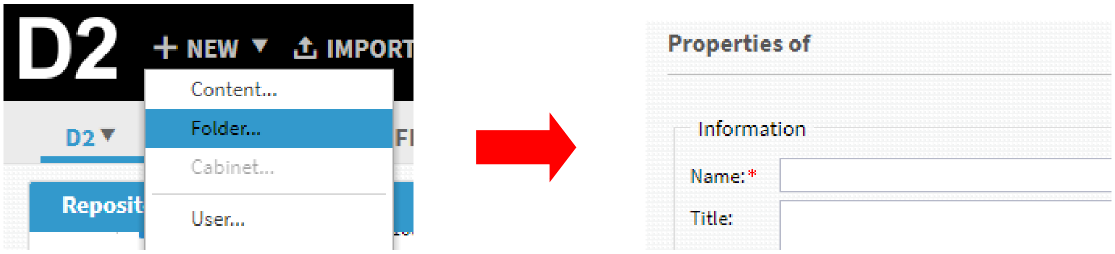


Figure 5.6

Your folder will appear on the Document List with your other folders in alphabetical order.

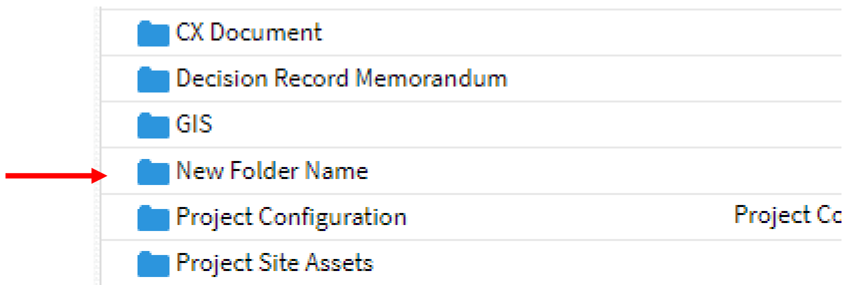


Figure 5.7

You will notice that there are several folders already created for your use. You may use these folders to start a library for your project. You may add a folder for emails or special meetings to store documents for future preservation. You must not delete any folders that the system creates automatically for you.

Chapter 6. Builds and PDF 508 Compliance

6.1. Introduction

The building of a virtual document results in the creation of a PDF file that can then be printed or uploaded to Back Office as part of the applicable project.

6.1.1Objectives

Upon completion of this chapter, you will be able to do the following:

- Generate D2 Build (building of a virtual document)
- Convert to Virtual Document
- Check your document for 508 compliance accessibility

6.2. Generate D2 Build

The building of a virtual document results in the creation of a PDF file that can then be printed or uploaded to Back Office as part of the applicable project.

6.2.1 The process of building a virtual document is as follows:

1. Navigate to the parent document via Repository browser and Document list widgets
2. Right click on the parent document in the Document list and select the Send to workflow option and then select the Generate D2 (see below)

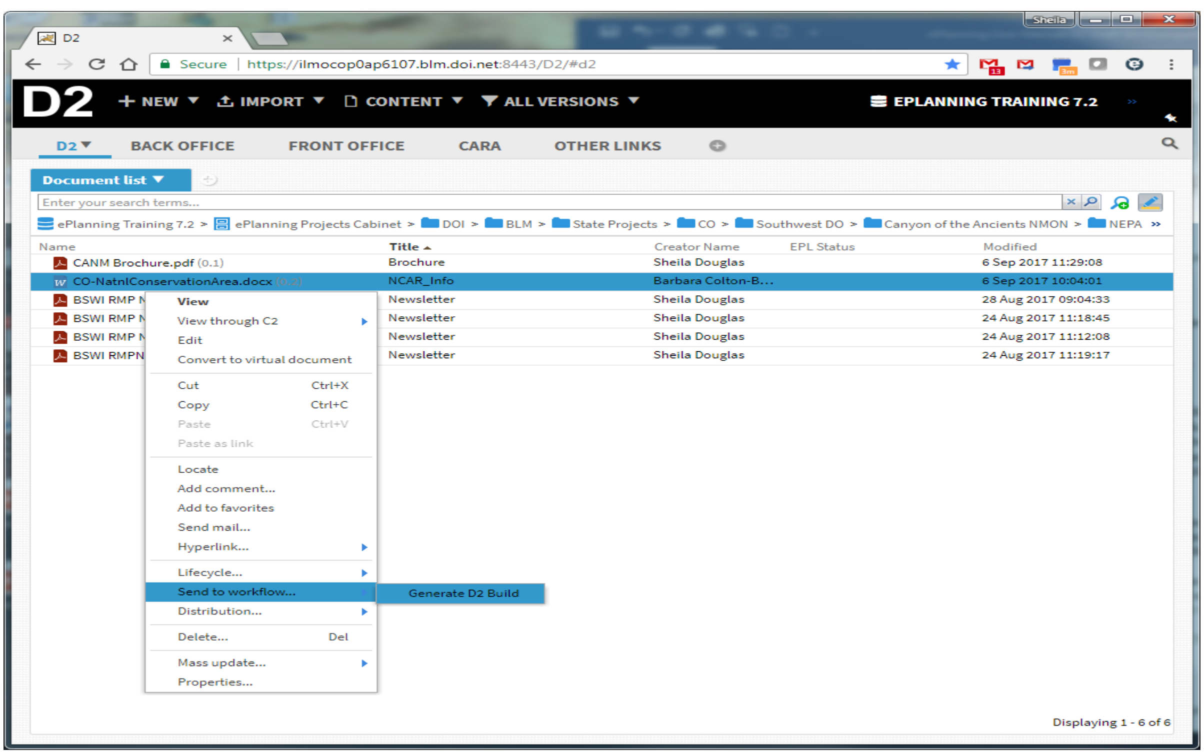


Figure 6.2.1-0-1

3. A Planning / Sending of workflow screen is displayed. Notification text can be entered, along with adding attachments to the notification and Planning and Follow-up dates can be entered.

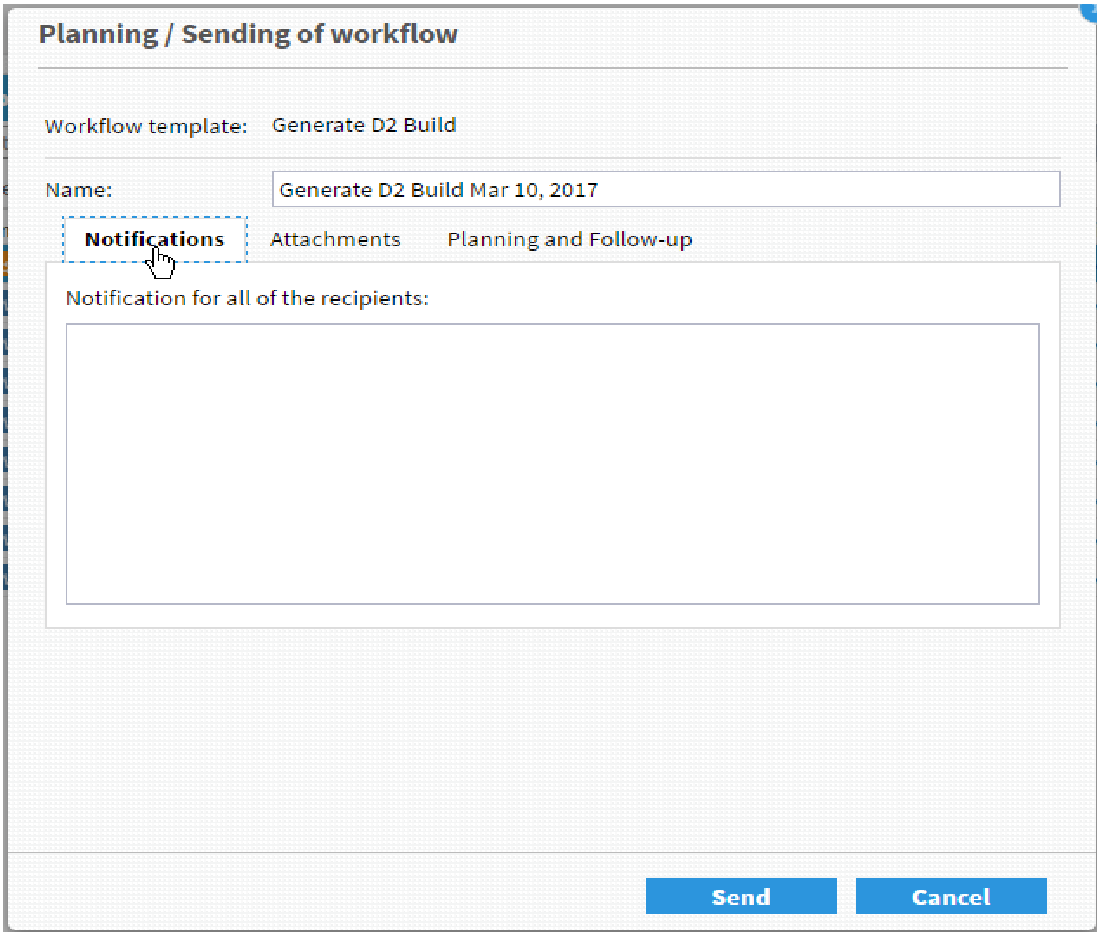


Figure 6.2.1-2

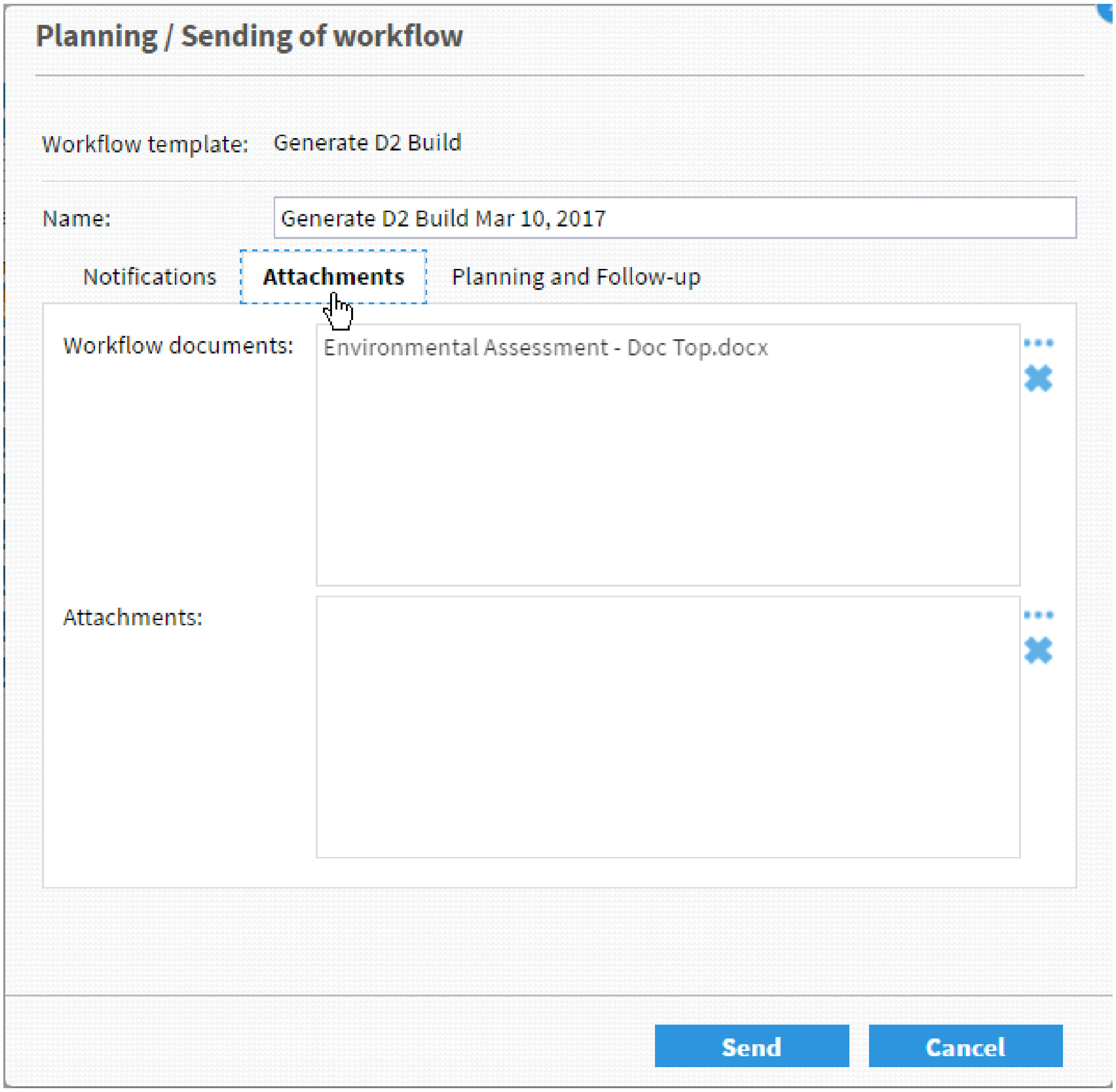

Planning / Sending of workflow
Workflow template:
Generate D2 Build
Name:
Generate D2 Build Mar 10, 2017
Notifications
Attachments
Planning and Follow-up
Workflow documents:
Environmental Assessment - Doc Top.docx
Attachments:
Send
Cancel

Figure 6.2.1-3

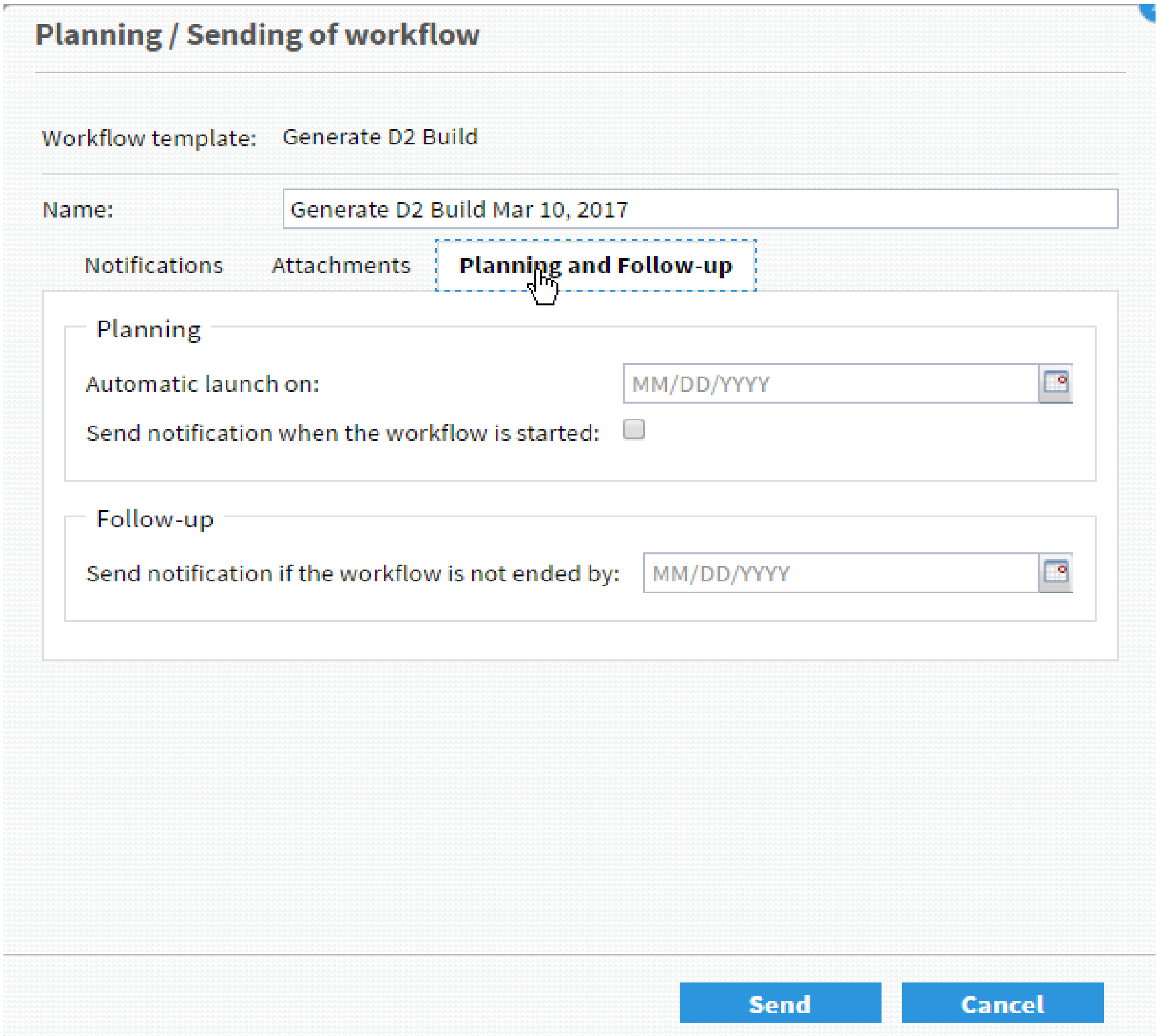


Figure 6.2.1-4

4. Click on the Send button. The window will grey and a spinning wheel will display for a bit while the document is being loaded for processing.

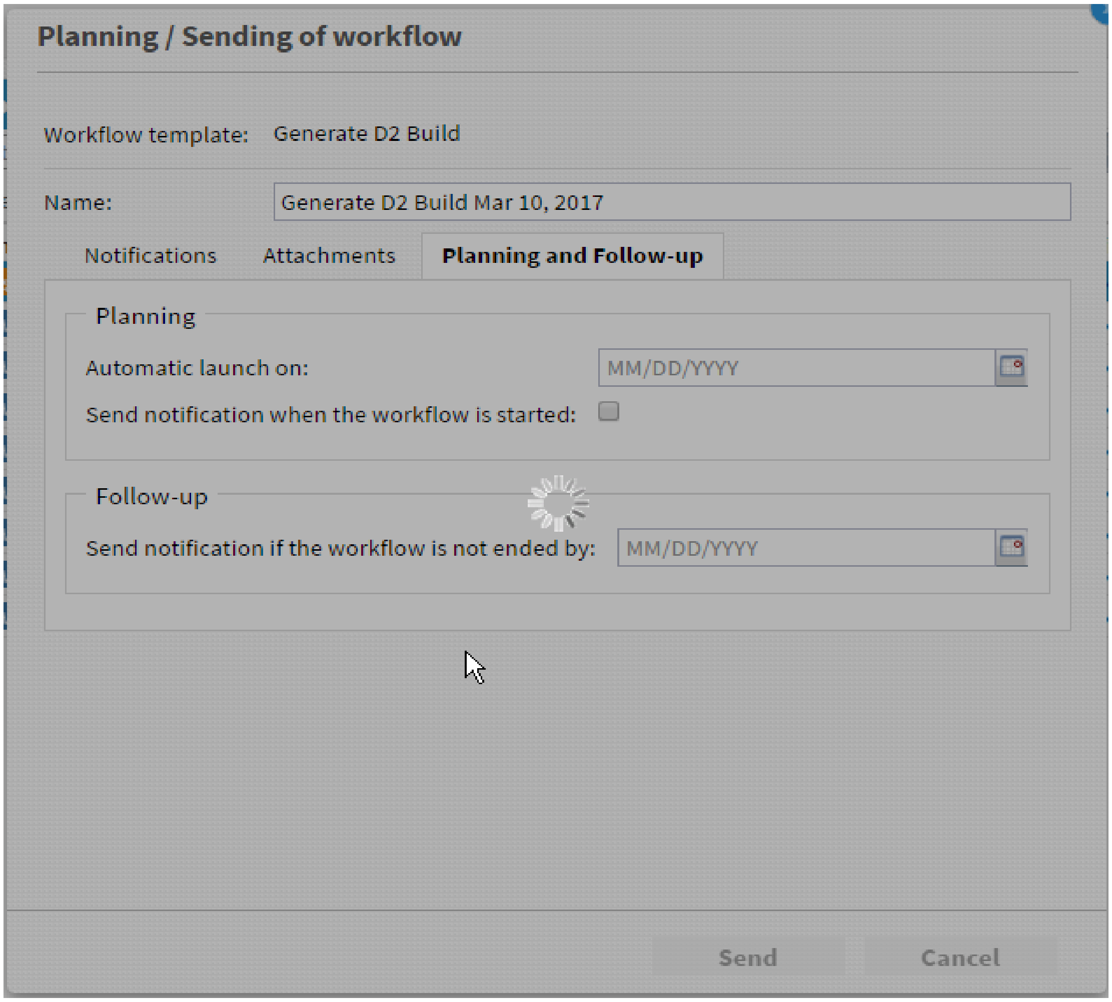


Figure 6.2.1-5

5. When finished, a notification window will be displayed and click on the OK button.

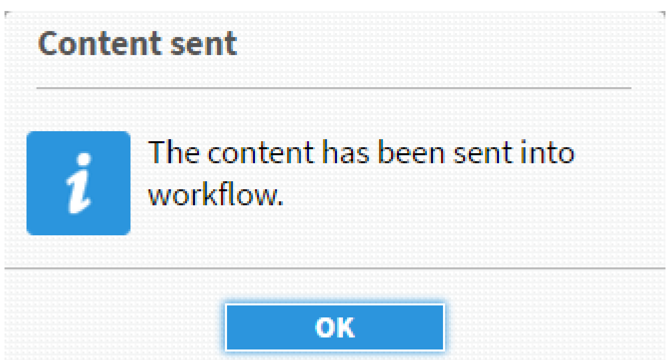


Figure 6.2.1-6

6. The document will build in the background. The finished PDF document will be placed in the same folder as the parent document.

- The Document list will not auto-update while the document builds so it will be necessary to select the Refresh option from the Document list drop down menu.

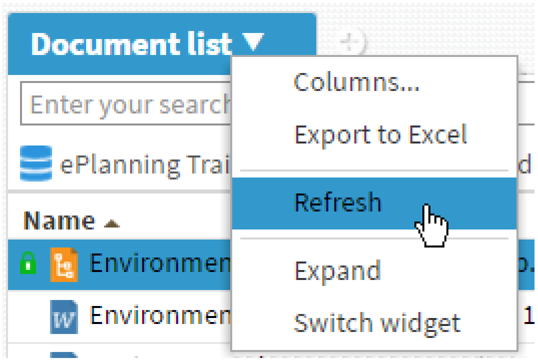


Figure 6.2.1-7

- If the document continues to be build you may see the final document listed with a gray icon to the left.

7. When the build process is complete a final document will be seen in the folder with a red PDF icon to the left of the document. In addition, a date and time stamp is added to the filename. This allows multiple builds of the same document as needed.

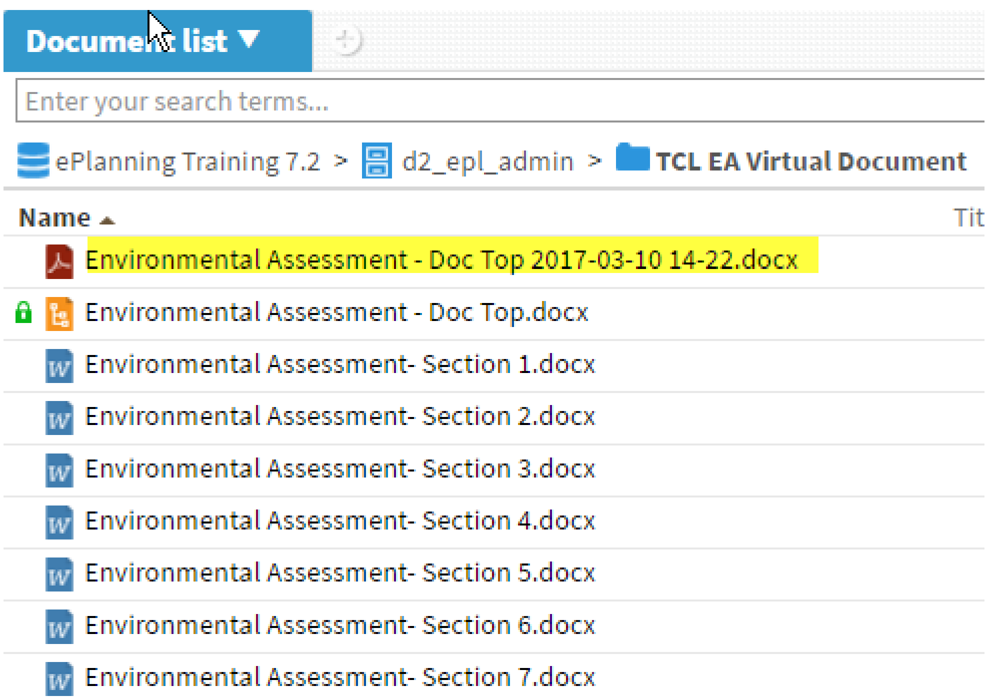


Figure 6.2.1-8

8. Double clicking on the final document will result in the PDF document being displayed in the default PDF viewer. The document is now ready to upload into Back Office if required.

6.3. Convert to Virtual Document

6.3.1 Step to Convert a Document to a Virtual Document

1. Make sure the Virtual Document widget is active. It is best to have this available in the right pane of the D2 workspace

2. Right click on the Parent document in the Document list widget and select Convert to virtual document option

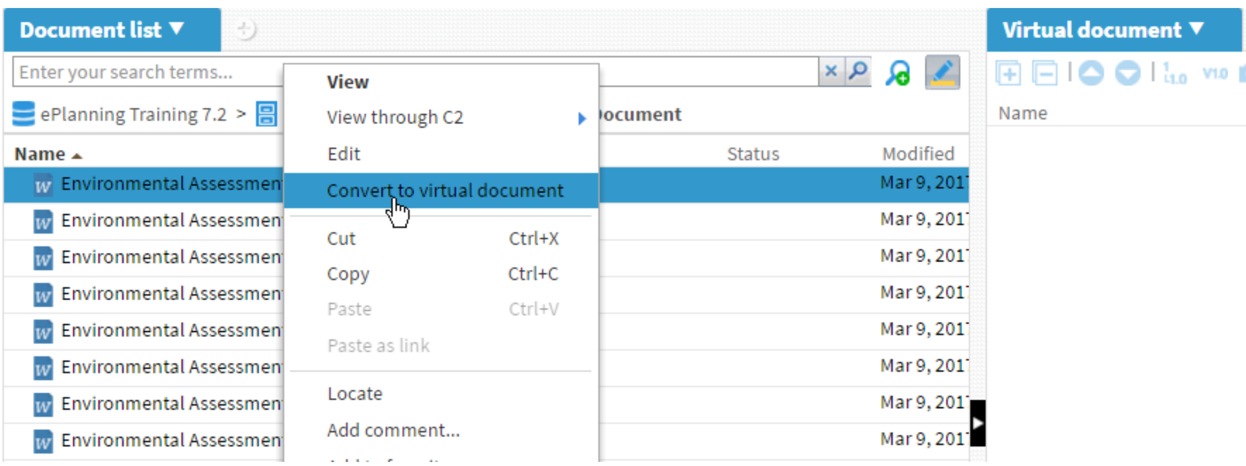


Figure 6.3.1-1

3. The parent document icon will change to an orange background with a white document symbol in the middle
4. Right click on the parent document again and select Display Virtual Document

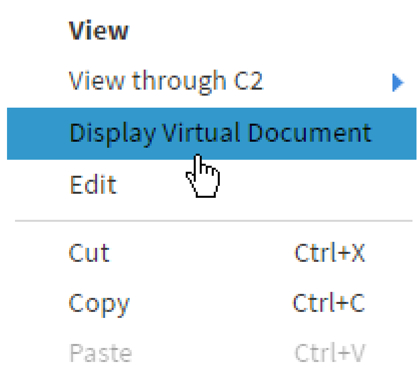


Figure 6.3.1-2

5. The Virtual Document widget will display the parent document

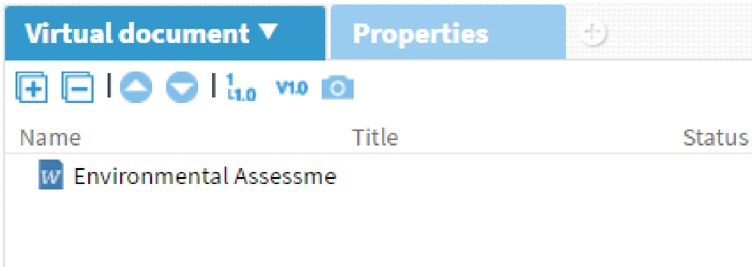


Figure 6.3.1-3

6. To add a child document, click on a child document in the Document list widget and drag it to the Parent document in the Virtual Document widget and let go of the mouse button

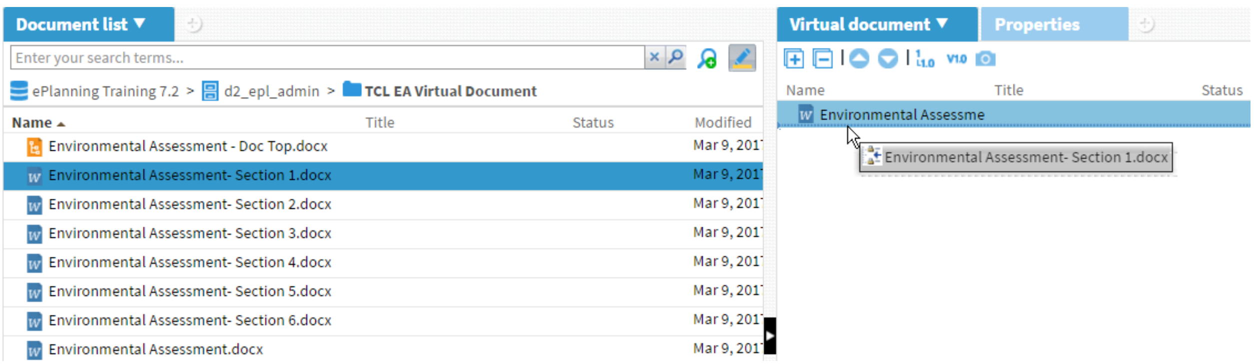


Figure 6.3.1-4

7. The Virtual Document widget will now show the Parent document and a child document, indented, on the next line

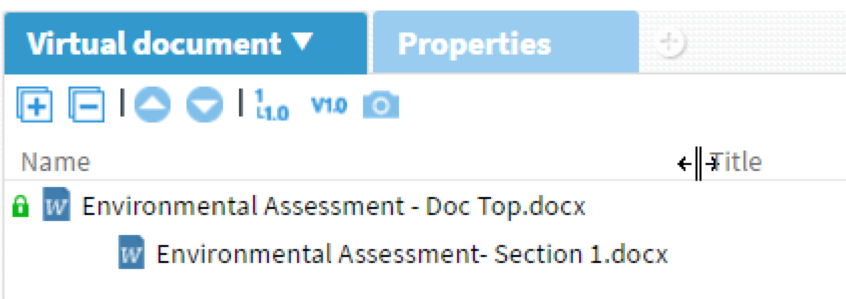


Figure 6.3.1-5

8. To add multiple child documents, select the desired documents and drag them onto the Parent document

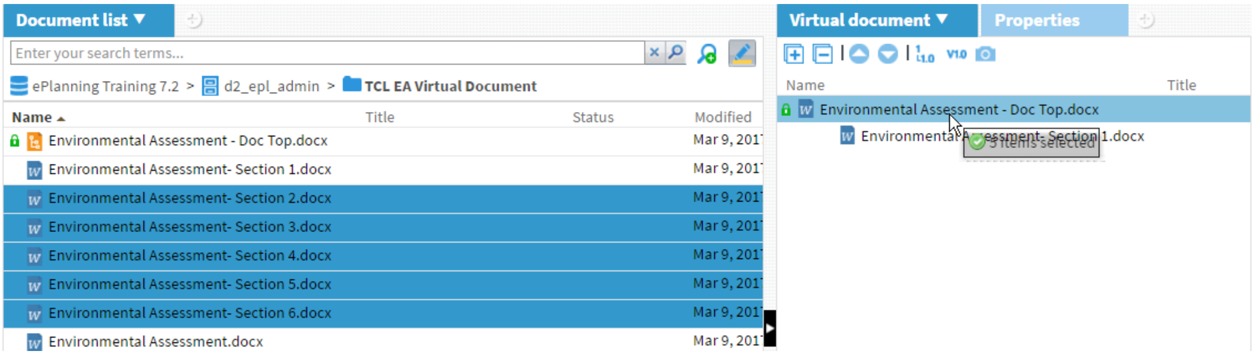


Figure 6.3.1-6

9. The Virtual Document widget will show all of the child documents below the parent document and below any existing child documents

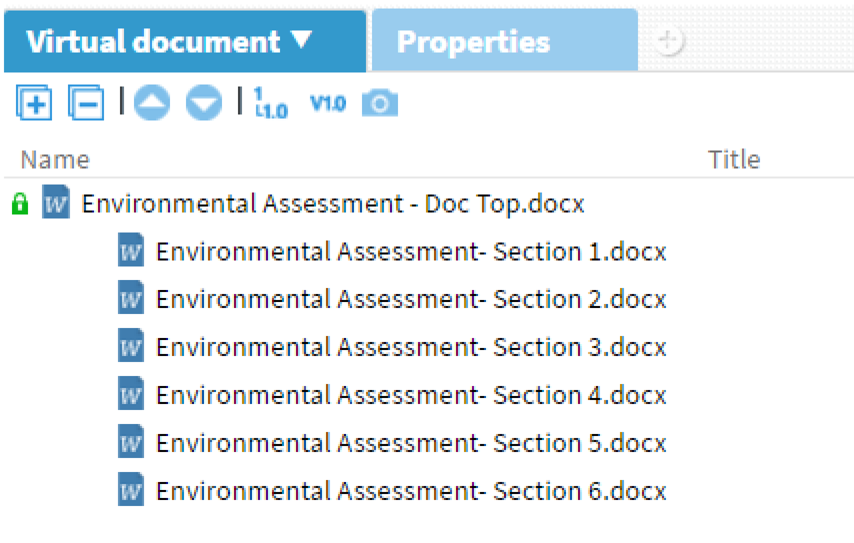


Figure 6.3.1-7

10. The last step is to check in the parent document from the Virtual Document widget by right clicking on the document and selecting Check In. The need for this is indicated by the padlock symbol to the left of the Parent document in the Virtual Document widget.
DO NOT do this from the Document list widget as this is not a situation where the contents of the document is being changed and checked in. This is only saving the Virtual Document setup, which is done via the Virtual Document widget Check In option.

When the process is complete, the padlock symbol will disappear from the Parent document.

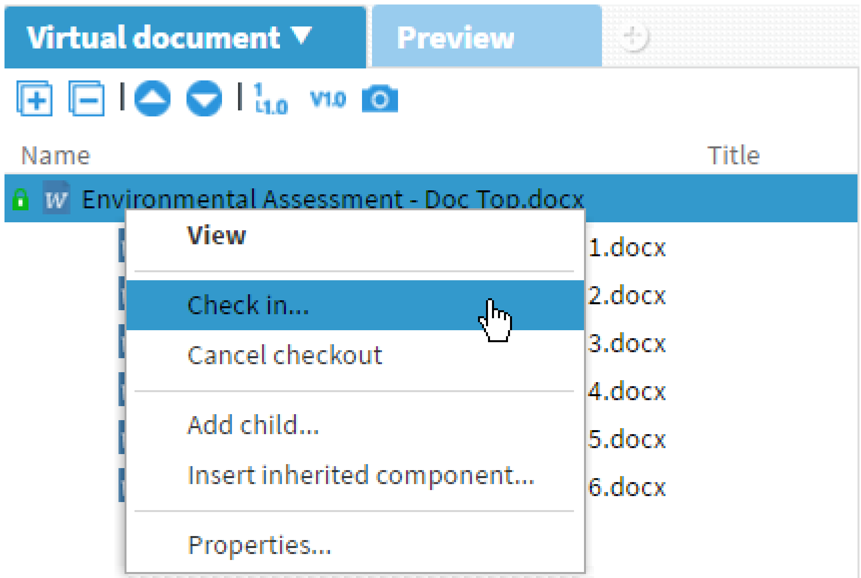


Figure 6.3-1-8

6.3.2 Adding a New Child Document

The steps to adding a child document to an existing virtual document are:

1. Create the child document as was described previously. Usually it is a matter of adding a section or chapter to a complete document, selecting the new text and pasting into a blank Word document and saving that new document in the same folder as the other Word segments for that document.

2. Import the new segment document into the D2 folder where the parent and child documents reside.

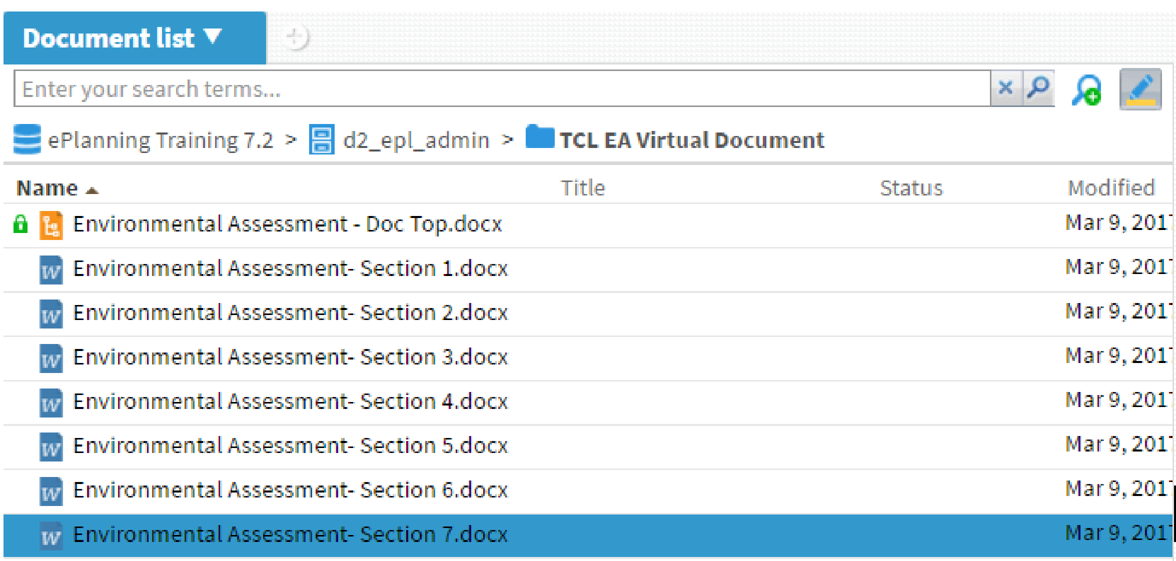


Figure 6.3.2-1

3. Make sure the Virtual Document widget is enabled and write click on the parent document and Display the Virtual Document

4. Click on the new segment document and drag the document onto the Parent document in the Virtual Document widget

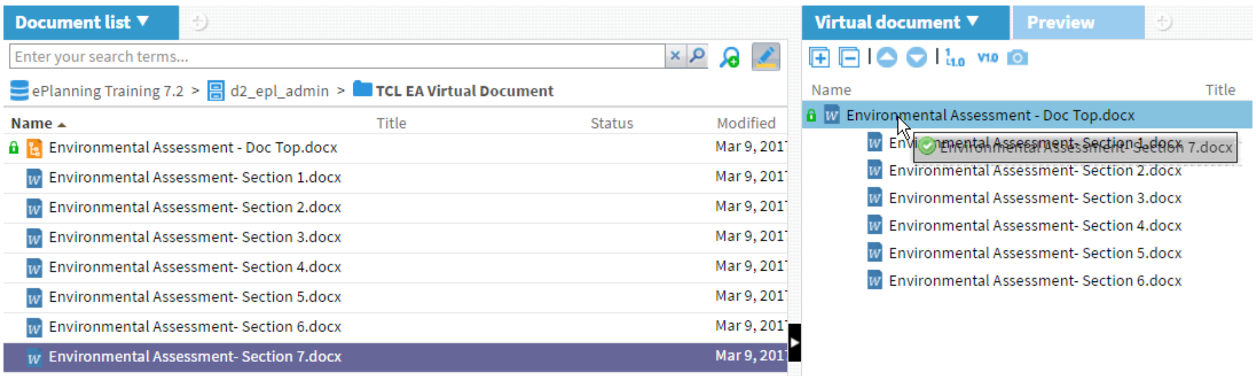


Figure 6.3.2-9

5. The new child document will now be displayed under the Parent document and after any existing child documents

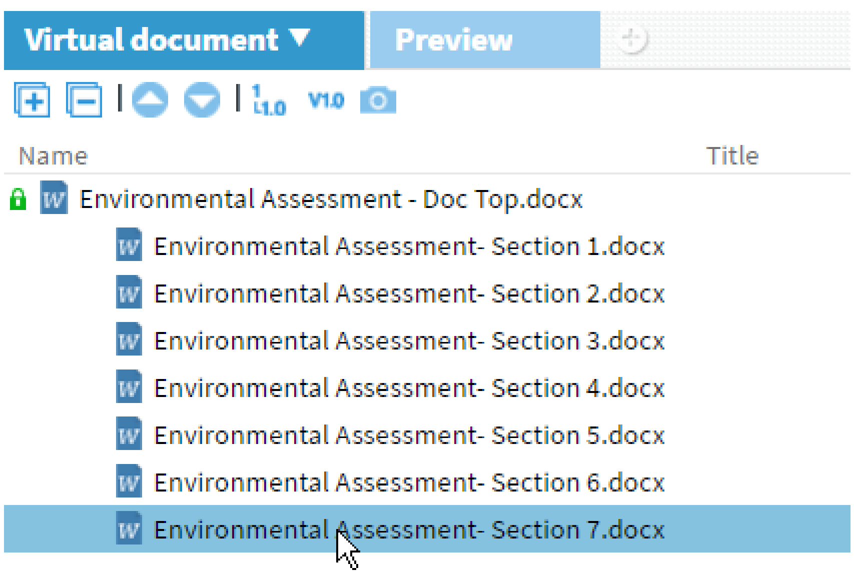


Figure 6.3.2-10

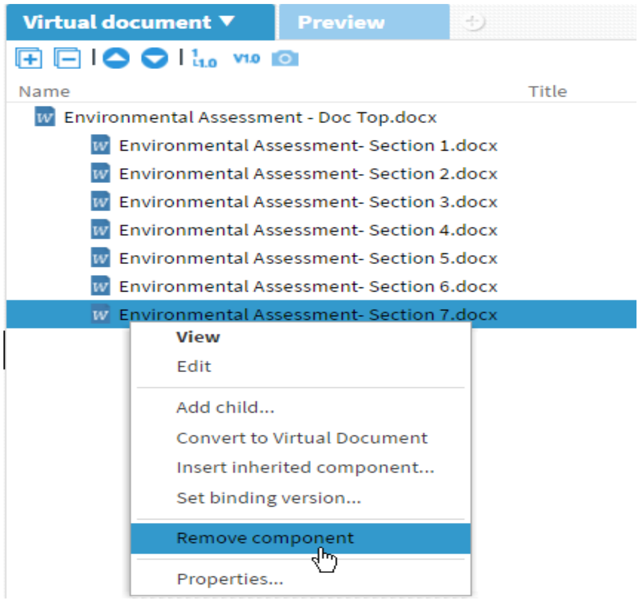
6. The virtual document will need to be checked in from within the Virtual Document widget in order to save the virtual document setup.
Right click on the parent document and select the Check In option. Once the process is complete, the padlock will disappear from the parent document.

6.3.3 Removing a Child Document

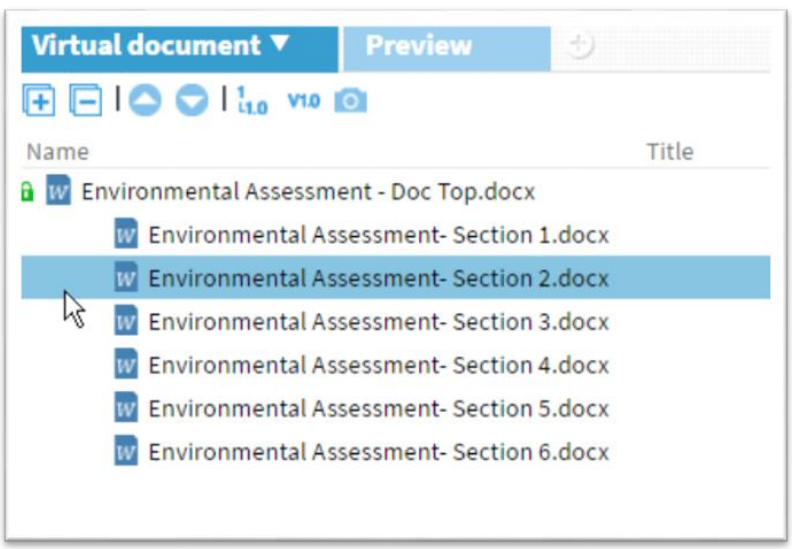
To remove a child document from a virtual document take the following steps:

1. Make sure the Virtual Document widget is enabled

2. Navigate to the parent document folder
3. Right click on the Parent document and select Display Virtual Document
4. In the Virtual Document widget, select the document(s) that are to be removed



5. Right click on a selected document and select the Remove Component option
6. The selected document(s) are removed from the Virtual Document list under the Parent document and a padlock symbol appears to the left of the parent document



7. The parent document will have to be checked in within the Virtual Document widget by right clicking on the Parent document and selecting the Check In option.

8. When the process has completed the padlock will disappear from the parent document

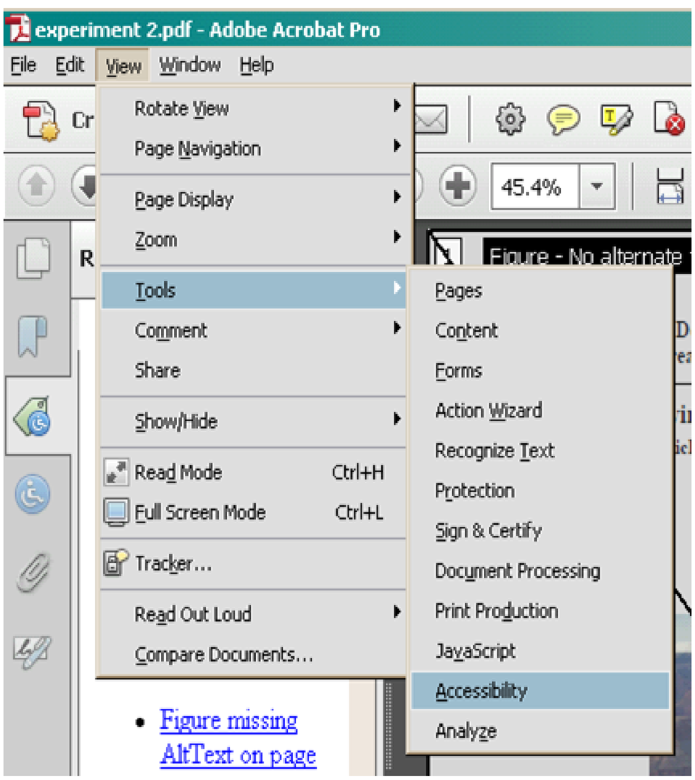
6.4. Making Documents 508 Compliant

508 compliance is more complex than this chapter can fully explain. It is important to know who your 508 compliance officer is and follow your state's and BLM's guidance.

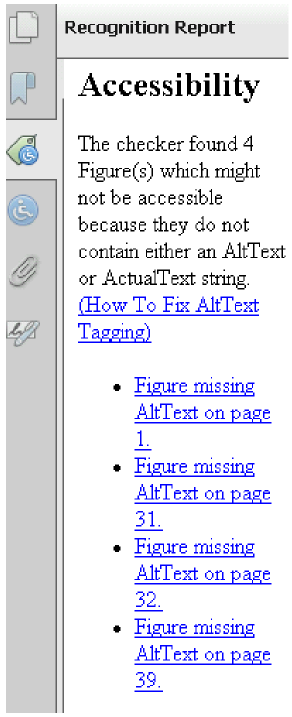
6.4.1 PDF (Adobe Acrobat Pro)

Follow these steps to help make your project's build PDF 508 compliant:

1. Go to your project's folder
2. Navigate to your build PDF, right click on the PDF and select **edit**
3. This will open your document in Adobe Pro 10 (check to be sure your language is set to English by clicking on **File** in the main menu, **Properties** and then clicking on the **Advanced** tab then click **OK**)
4. Click on **View>Tools>Accessibility** from the menu options, then under **Accessibility** on the right side of your screen select **Full Check** and then click on the "Start Checking" and "OK" button. Then select **Add Tags to Document**, and **TouchUp Reading Order** Click on the "TouchUp Reading Order" box at the top and drag it out of your way so you can view your document and the Accessibility Report



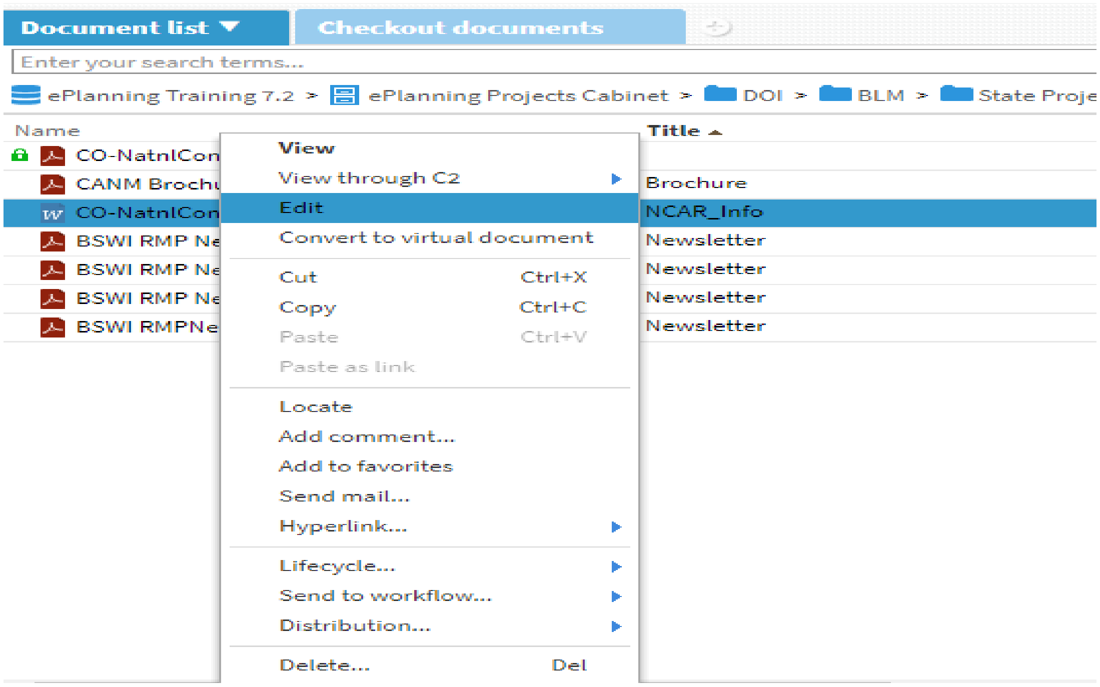
5. Your Accessibility Report will appear on the left hand side of your screen (see below image)



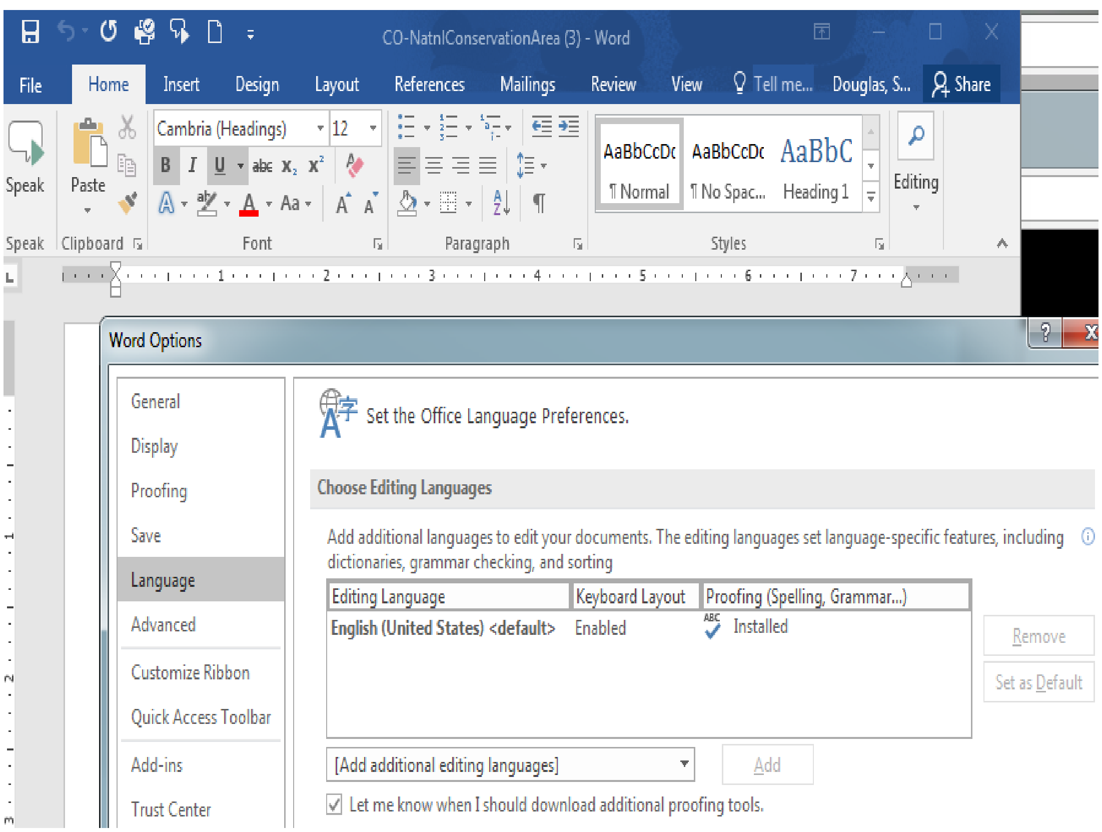
6. Now scroll down your **Accessibility Report** until you find your **Detailed Report** with **Errors**, if you have no Accessibility errors your document is compliant.
7. To correct your errors simply click on the error link for each error in order. This will take you to your error in your pdf document. Once you are taken to the figure that says "No alternative text exists", double click on the figure and click on the **Figure** button on the TouchUp Reading Order menu box. Then right click on the figure and select "Edit Alternate Text".
8. This will allow you add the alternate text necessary to make that portion of document 508 compliant. Type in your desired text and click **OK**. Repeat this process as often as necessary.
9. Once all corrections have been made (or if you did not have any). Click the Close button on the **TouchUp Reading Order** menu.
10. To ensure nothing was missed, go back and click on **Full Check** if you have no errors come up then click **Save** and close out of the PDF document and **Check In** the document as the next version, if you have more errors repeat these steps from the beginning

6.5 Word

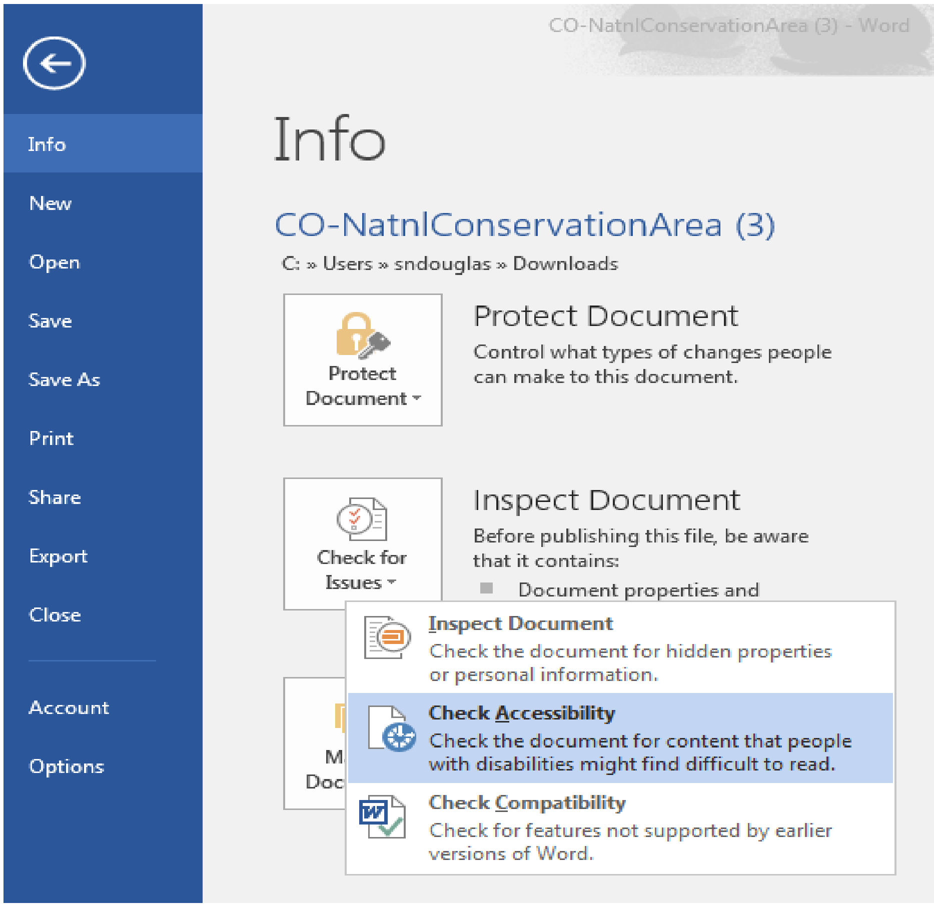
Follow these steps to help make your project's Word documents are 508 compliant:
1. Click on projects folder
2. Navigate to your Word document, right click on the document and select **edit**



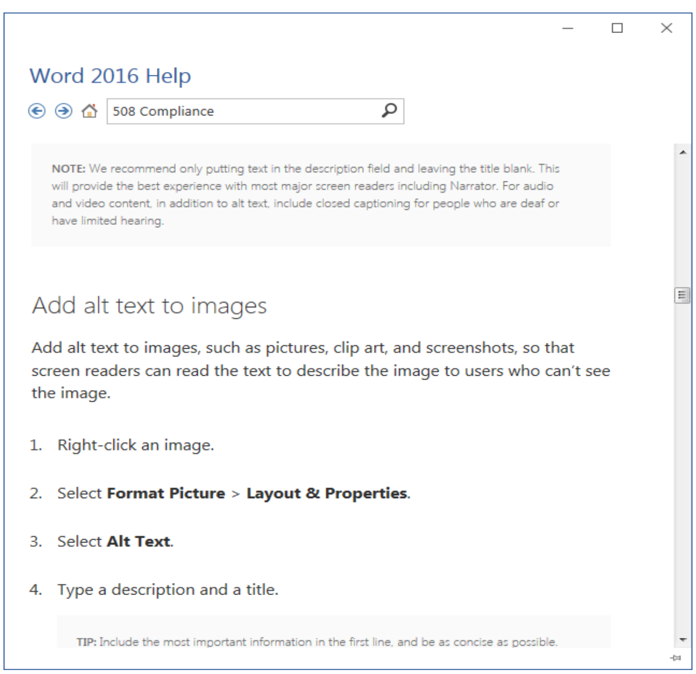
3. This will download your document in Word (check to be sure your language is set to English by clicking on **File** in the main menu, **Options** and then clicking on the **Language** tab then click **OK**)



4. Click on **File>Check for Issues>Check Accessibility**



5. Correct / Format all necessary items.
6. For additional assistance search for help by typing "508 compliance"



Chapter 7. Back Office

7.1 Introduction

This chapter covers the functionality of both the Back Office (BO) and Front Office (FO). The BO deals with the creation and maintenance of websites. The FO (the NEPA and LUP Registers) is the place where ePlanning information and documents are published to the Internet for public view and commenting.

7.1.1 Objectives

Upon completion of this chapter, you will be able to:
- Create a Project Website.
- Administer and maintain a Project Website from Back Office.
- Understand and interact with Front Office's ***final and public*** view of a Project Website.

7.2 Back Office

Now that we have two builds with a status of **"done"** for our NEPA project, it is now time to log in to the Back Office. The BO is where:
- Webpages are created and maintained.
- NEPA and LUP Registers are populated.
- Comment periods are set-up.
- ePlanning users can enter comment letters, supporting documents, and/or additional maps to their project web pages.

The instructions which follow, demonstrate how to create a Project Website with either an LUP or NEPA project that has an open public comment period. Alternatively, the procedure for creating a Summary Web Page is similar with the exception of choosing Summary Web Page as opposed to Project Website and following the same basic instructions provided. A Summary Web Page is the type of website used for NEPA projects such as CX and DNA that do not require extensive information and/or multiple sections. The types of web pages can be created, which are:
1. NEPA Project Websites.
2. NEPA Summary Web Pages.
3. LUP Project Websites.

Table 7.1. ePlanning Website Types

Website Type	**Description**
NEPA Websites	
Project Website	This type of website is typically for EISs or, larger EAs that are going to have a public comment period(s).

Summary Web Page	This is the simplest ePlanning web page. This website type is for DNAs, CXs, and simple EAs. This type's single page structure shows the who, what, where and when all in one place. Additionally, it provides a link to the documents, maps, and any other written information.
RMP Websites	
LUP Project Website	This type of website is used when working on a complex RMP where a significant amount of information needs to be available for public view.

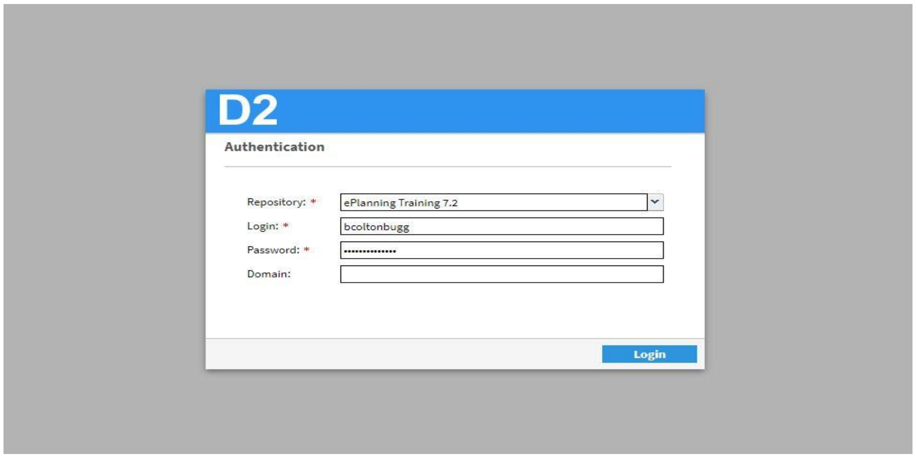
7.3 General Information

The ePlanning Back Office is accessed from the D2 primary login screen by clicking on the "Back Office" tab. Even though some people will only be using BO, they will still need to be an ePlanning user.

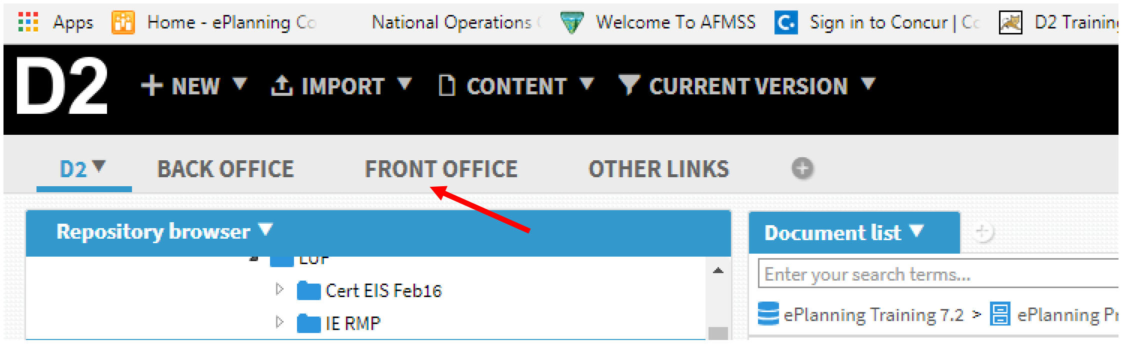
7.3.1 Accessing the Back Office

The process for accessing Back Office is the same as opening D2 in ePlanning, which is:

1. Log into the D2 application (Slide 1)

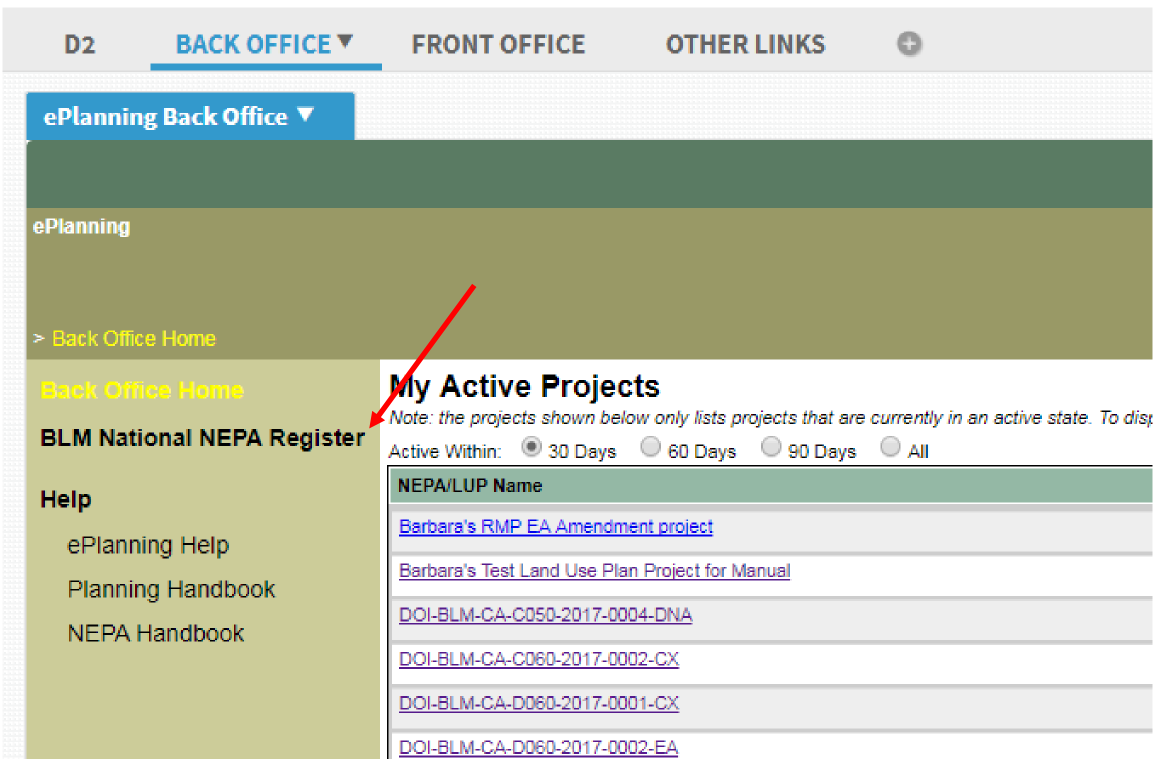


2. Click on "Back Office" tab

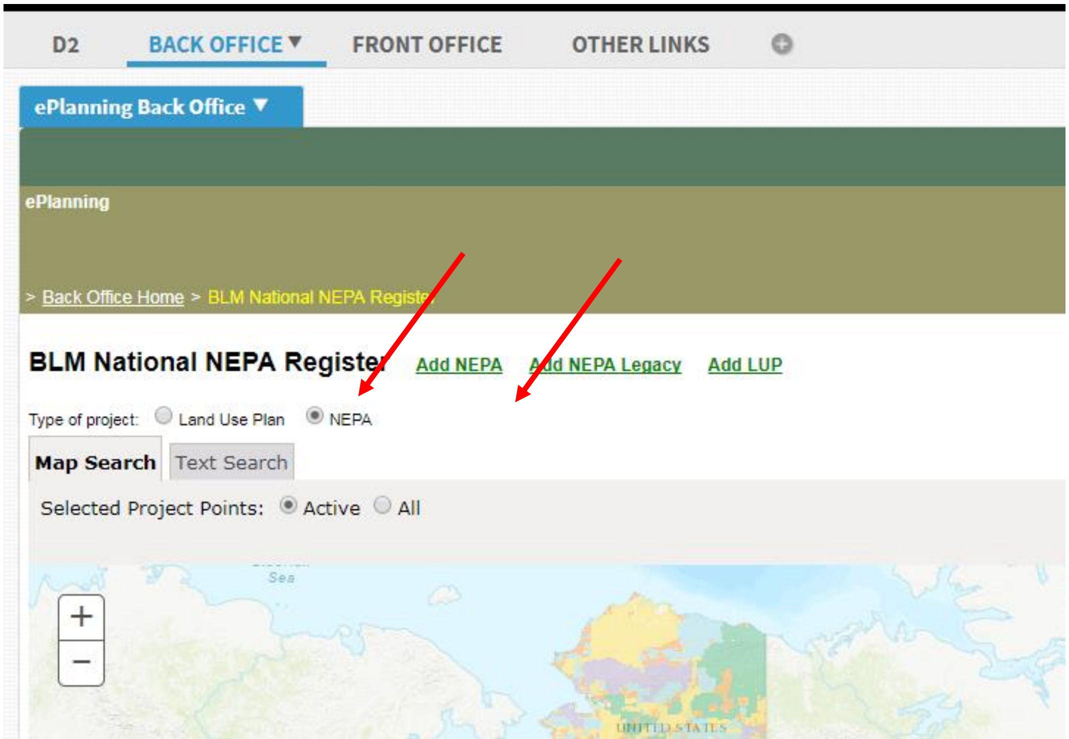


Locating a project in Back Office

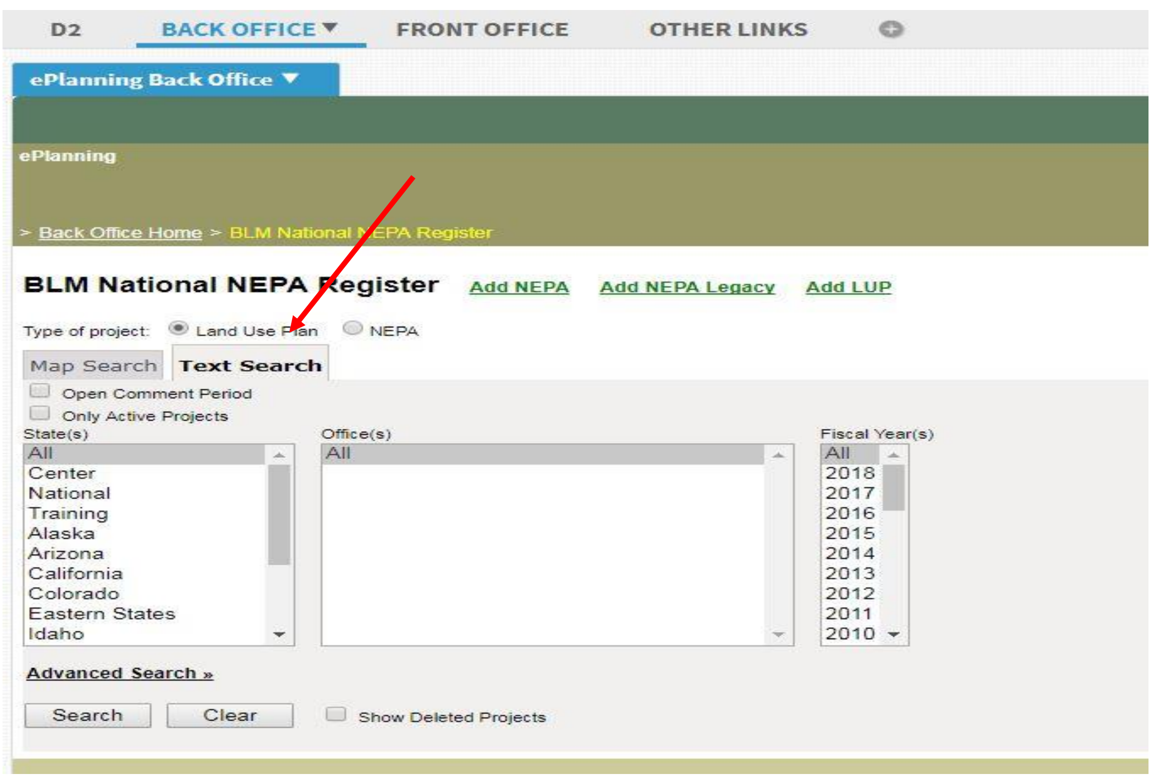
3. Click on BLM National NEPA Register



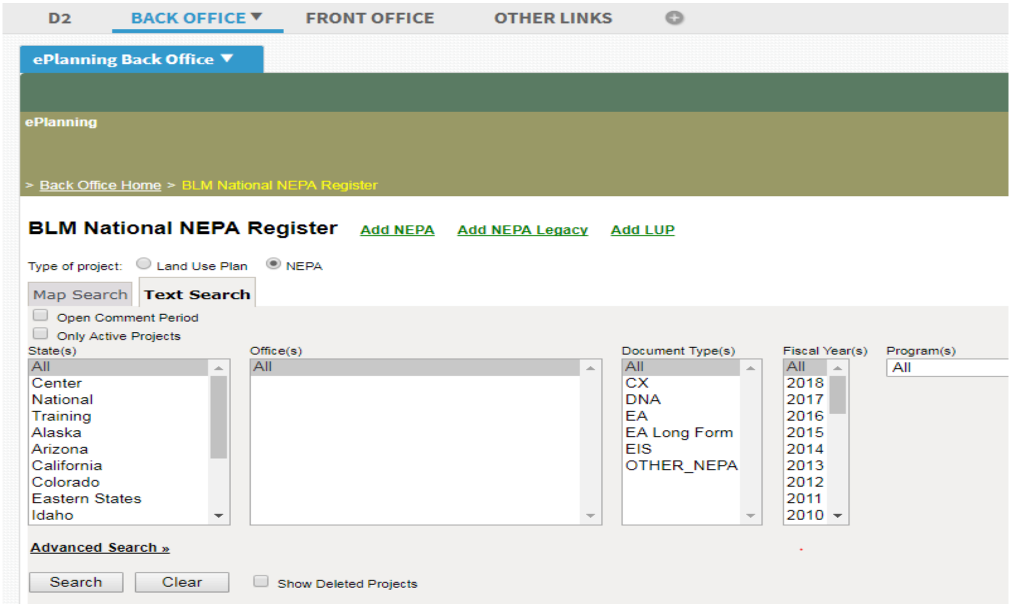
4. Select “type of project”



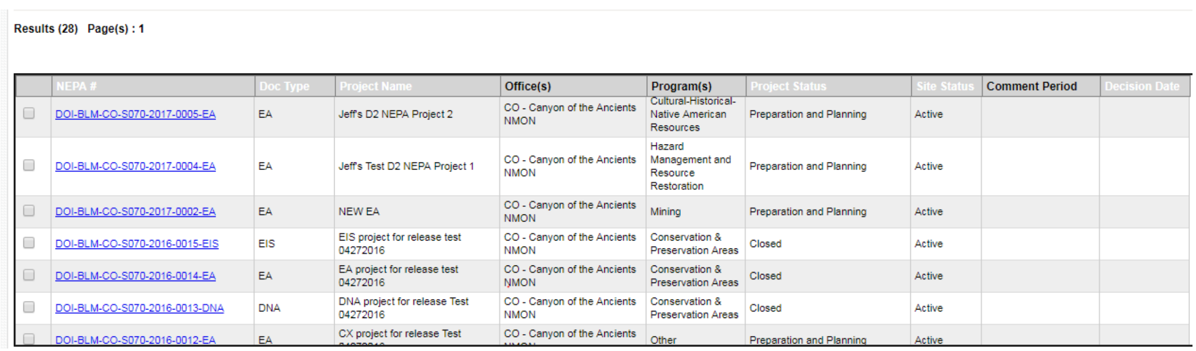
a. For Land Use Plan projects-select Land Use Plan radio button and complete other fields such as State, Office, etc. to narrow search.



b. For NEPA Projects-select NEPA radio button and complete other fields such as State, Office, etc. to narrow search.



5. The results will show up on your screen.

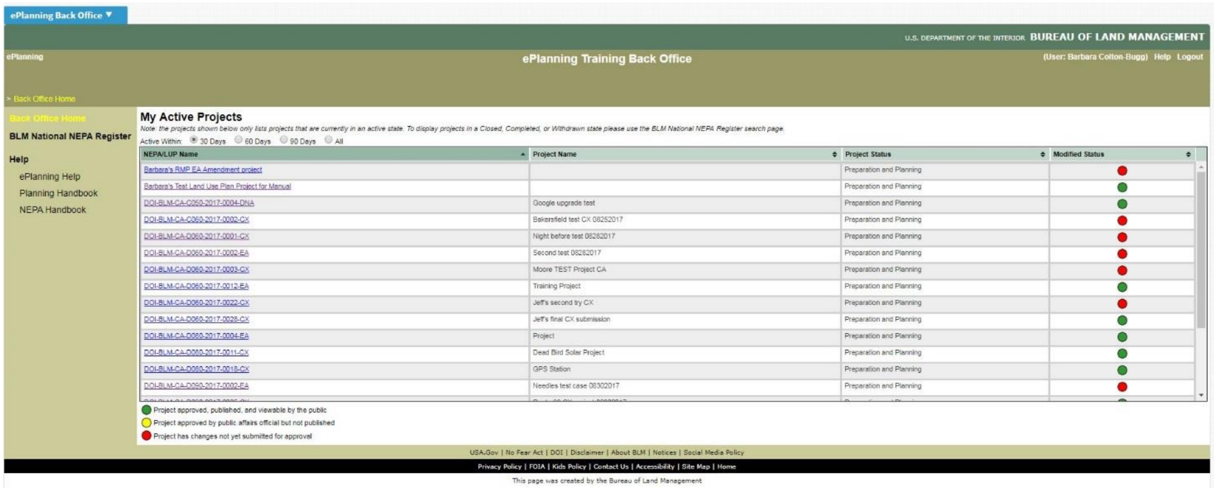


Results (28) Page(s) : 1

	NEPA #	Doc Type	Project Name	Office(s)	Program(s)	Project Status	Site Status	Comment Period	Decision Date
	DOI-BLM-CO-S070-2017-0005-EA	EA	Jeff's D2 NEPA Project 2	CO - Canyon of the Ancients NMON	Cultural-Historical-Native American Resources	Preparation and Planning	Active		
	DOI-BLM-CO-S070-2017-0004-EA	EA	Jeff's Test D2 NEPA Project 1	CO - Canyon of the Ancients NMON	Hazard Management and Resource Restoration	Preparation and Planning	Active		
	DOI-BLM-CO-S070-2017-0002-EA	EA	NEW EA	CO - Canyon of the Ancients NMON	Mining	Preparation and Planning	Active		
	DOI-BLM-CO-S070-2016-0015-EIS	EIS	EIS project for release test 04272016	CO - Canyon of the Ancients NMON	Conservation & Preservation Areas	Closed	Active		
	DOI-BLM-CO-S070-2016-0014-EA	EA	EA project for release test 04272016	CO - Canyon of the Ancients NMON	Conservation & Preservation Areas	Closed	Active		
	DOI-BLM-CO-S070-2016-0013-DNA	DNA	DNA project for release Test 04272016	CO - Canyon of the Ancients NMON	Conservation & Preservation Areas	Closed	Active		
	DOI-BLM-CO-S070-2016-0012-EA	EA	CX project for release Test	CO - Canyon of the Ancients	Other	Preparation and Planning	Active		

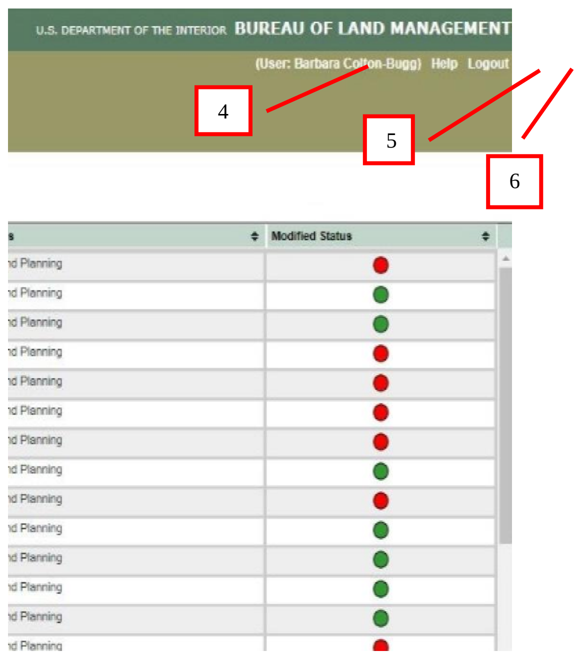
7.3.2 Back Office Navigation

After you have logged into BO, your BO's homepage will be displayed (see image below). If you do not see any projects or a recently created project listed under "My Active Projects" it means that you (as the user or project creator) have not yet created the websites for any NEPA or RMP projects. Once you start creating websites, the display pane will show all active projects.



7.3.2.1 Understanding the Back Office Homepage

See numbered chart below for locations.



1. **Breadcrumbs**: Use this for path navigation while in the BO.

2. **Site Navigation**: This section displays links within the BO, which will change depending upon where you are within the application. For example, as soon as you create a website, a **Site Administration** link will show up towards the bottom of the navigation pane. Additionally, when you are working on developing and/or maintaining a website, the site navigation section for that particular website type will be displayed.

3. **Display Pane**: This section displays links to your active project(s) when you are on the BO homepage.

4. **User**: This shows the name of the user who is logged into the BO.

5. **Help**: This displays a link to the BO's help system. When clicked, an HTML page opens in a new window displaying the BO Help, with the top of the page being the topic related to where you are in the BO when you clicked Help (content sensitive help).

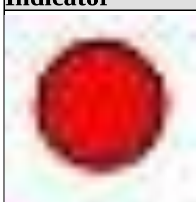
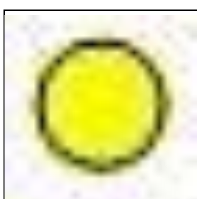
6. **Logout**: Closes all BO related browser windows.

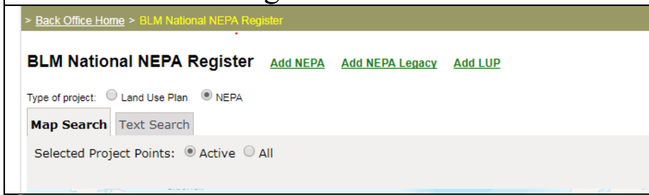
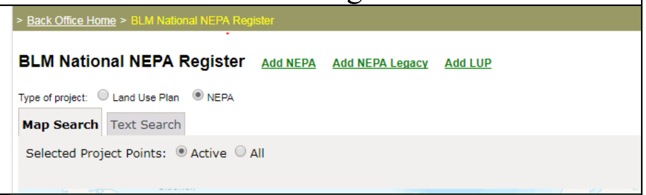
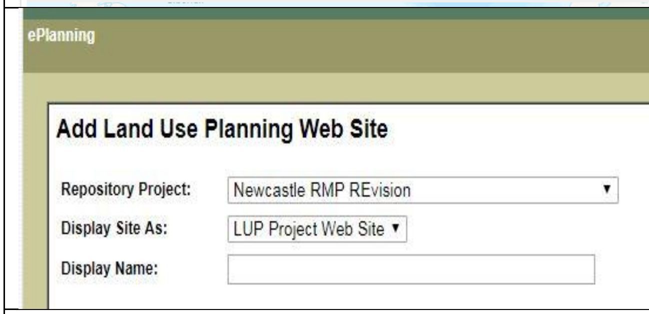
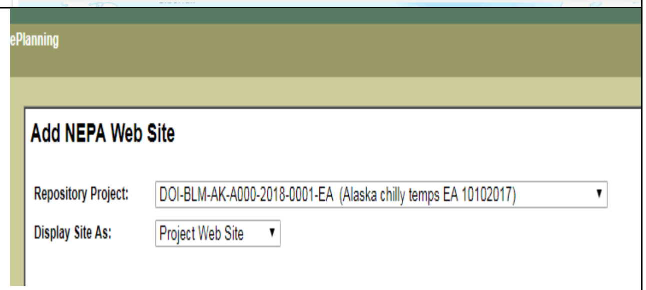
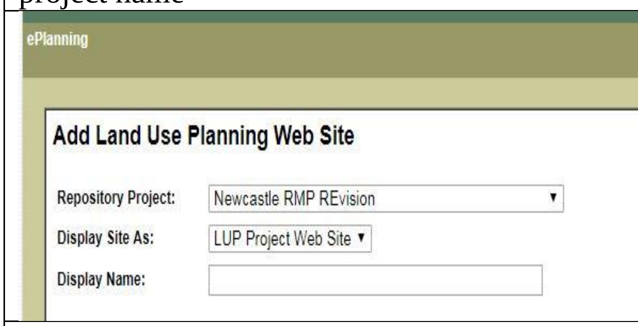
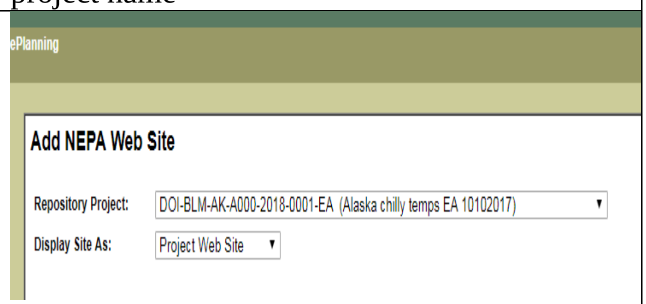
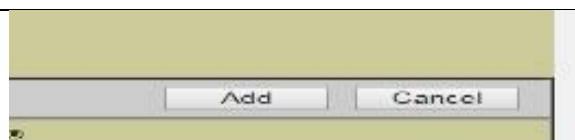
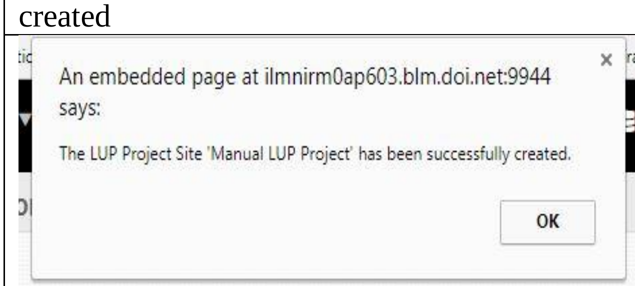
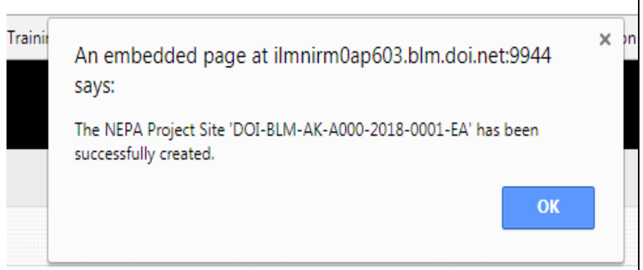
7.3.2.2 Understanding Webpage Status Indicators: Colors & Definitions

Depending on the publishing stage of a project, the webpage status indicator displays a specific color. The three stages are described below.

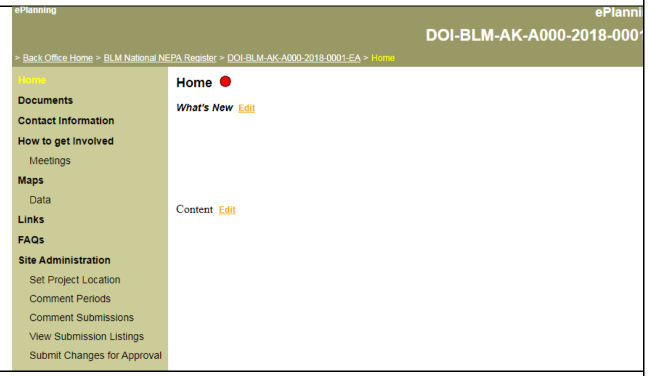
- **Red**: The BO page content has just been created and/or differs from the Front Office website, or has not been approved by the Public Affairs Representative.
- **Yellow**: The page content in BO has been approved by the Public Affairs Representative, but has not been synchronized or published to the FO website.
- **Green**: The BO page content has been approved by Public Affairs and all metadata has been synchronized with the FO website. The project is in a status to be available to the public for review and comment.

Table 7.3. Back Office Webpage Status

Indicator	Description
	A red radio button at the top of the project page means the website has been modified and/or has not yet been approved for publication to the Front Office. As soon as a project is added to a BLM National NEPA Register, the BO will create the selected web page(s). However, there will not be any content in any of the pages and the indicator will be set to red. Additionally, whenever changes or updates are made to the sections other than the Home page of a project, the status indicator will return to red and the project will need to be re-published using the three-step publication process.
	A yellow radio button means the site content has been approved by a Public Affairs person, but the content has NOT been published to the FO (BLM National NEPA Register) website.
	A green radio button means the website is up to date and the content has been published to the FO (BLM National NEPA Register) website.

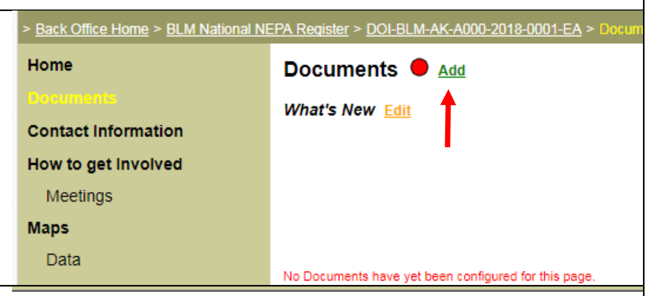
Adding LUP Projects	Adding NEPA Projects
Select Land Use Plan radio button	Select NEPA radio button
Select “Add LUP” Link to right of words “BLM National NEPA Register”	Select “Add NEPA” Link to right of words “BLM National NEPA Register”
	
	
Click Repository Project dropdown to select project name	Click Repository Project dropdown to select project name
	
Select type of Display there is only one for LUP—LUP Project Web Site)	Select type of Display here—either Project Website or Project Summary Page
Add Display name for project	
Click the Add button in lower right	
	
Should get message stating “The LUP Project Site “Project name” has been successfully created	Should get message stating “The NEPA Project Site “Project name” has been successfully created
	
Click the “OK” button	

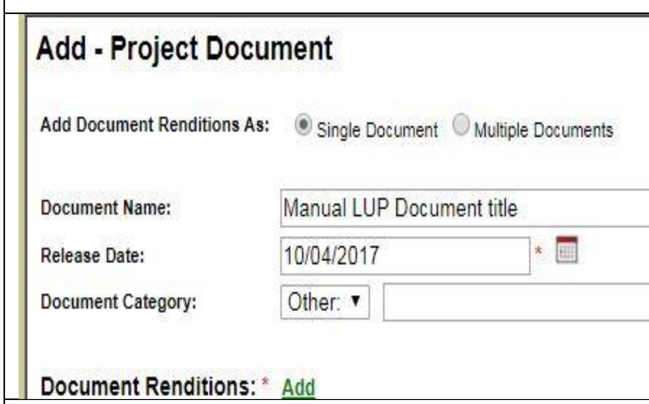
Project landing page (Home) is displayed

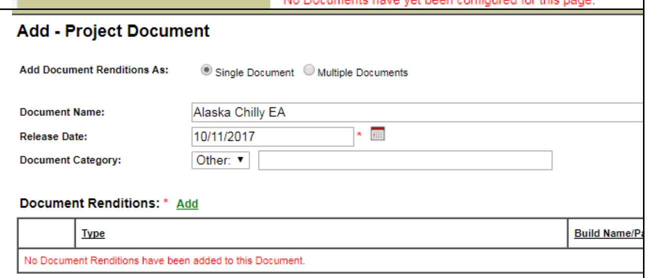


Add content to home page, i.e., project purpose, location, description, how to navigate page, can add press release info here—click on "add" or "edit" to add content. When finished, click "Add" or "Save" in the lower right corner to save information on each tab. It is recommended that the user work their way down the page, navigating from left to right and top to bottom when adding content. This way, a section is not overlooked.

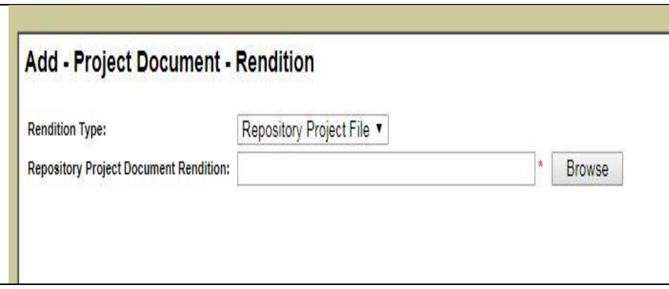
Click on "Documents & Reports in left navigation pane to go to next section to add documents and reports—click on "add" or "edit" link at the top to add content. When finished, click "Save" to save the newly added information.



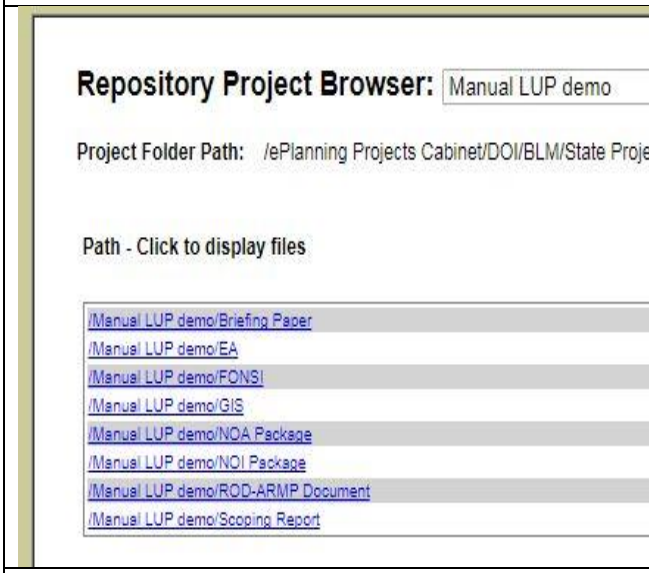


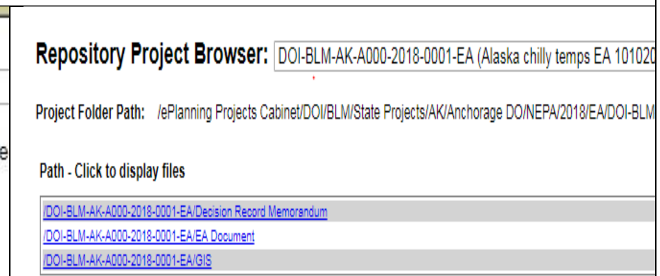


Type in "Document Name" and select Release Date; then click the "Add" button next to the words "Document Renditions"

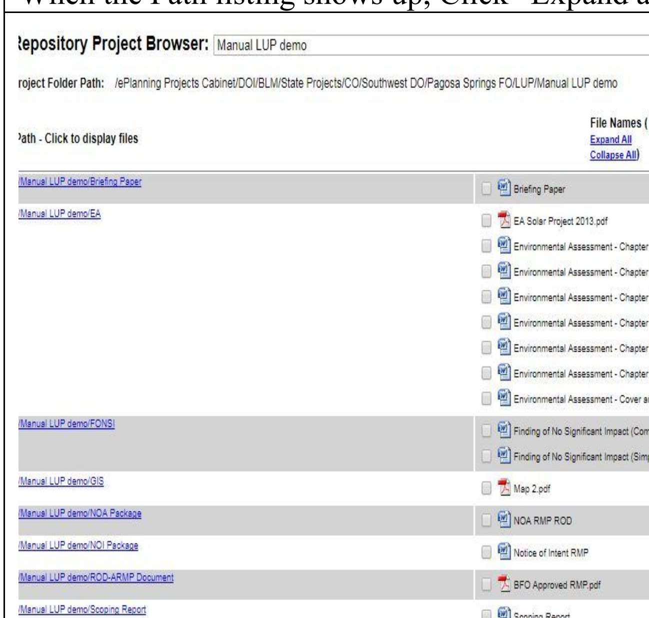


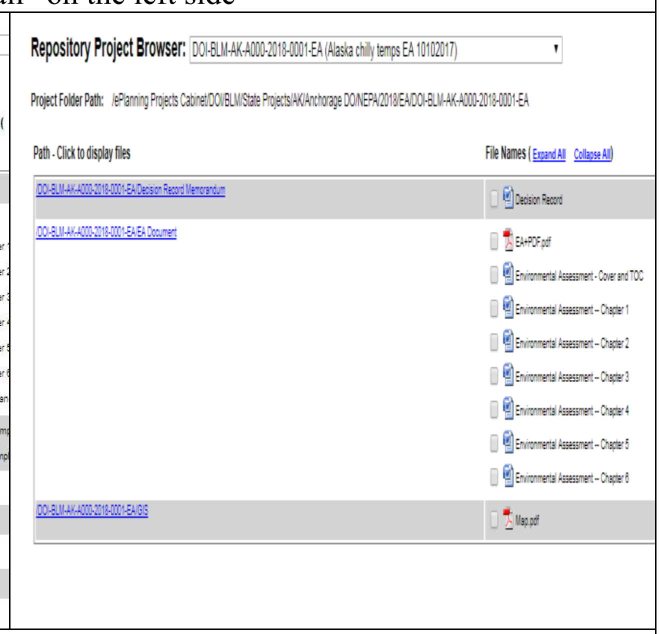
Click the Browse button



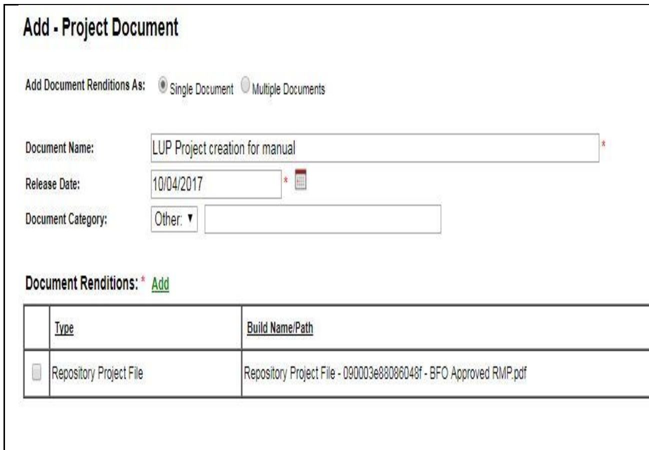


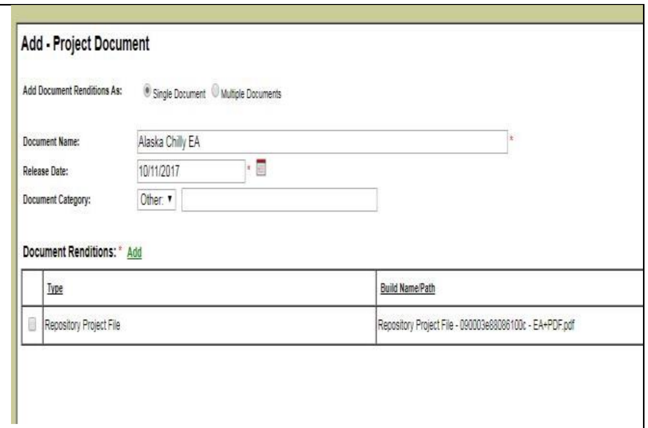
When the Path listing shows up, Click "Expand all" on the left side

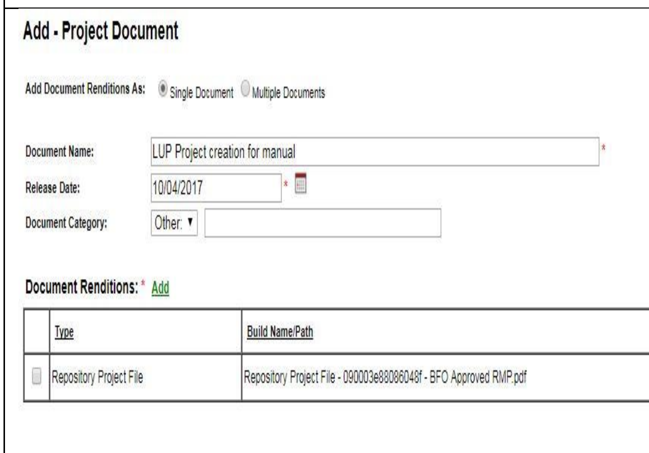


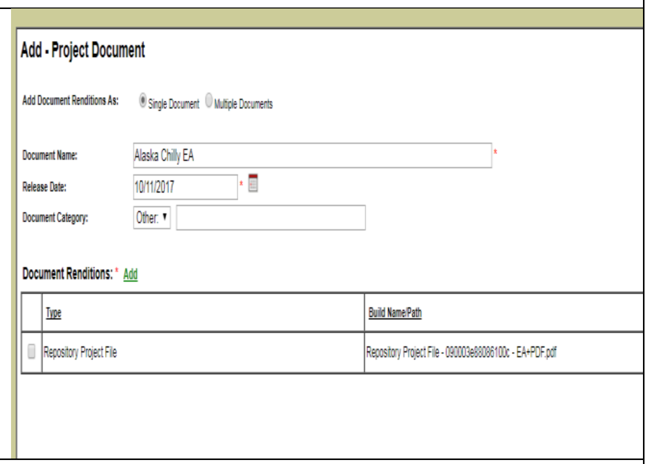


Select document by clicking the box to the left of the document name and clicking the "Select" button at the lower right hand corner of the screen. The screen will refresh with the repository project Document Rendition filled in.



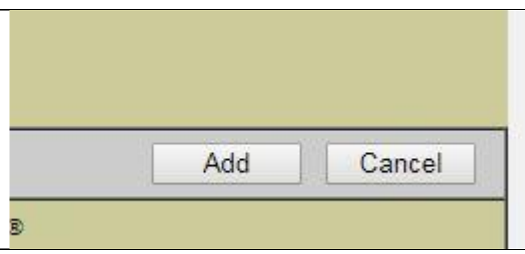


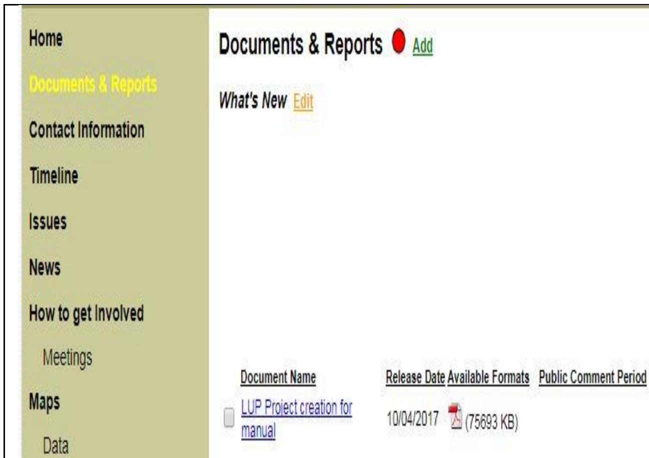
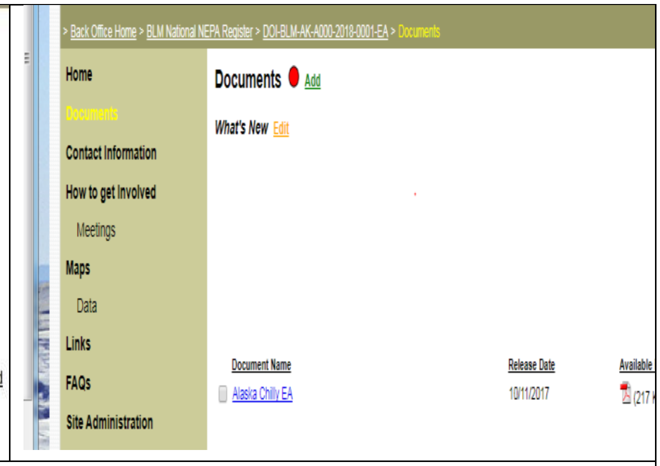


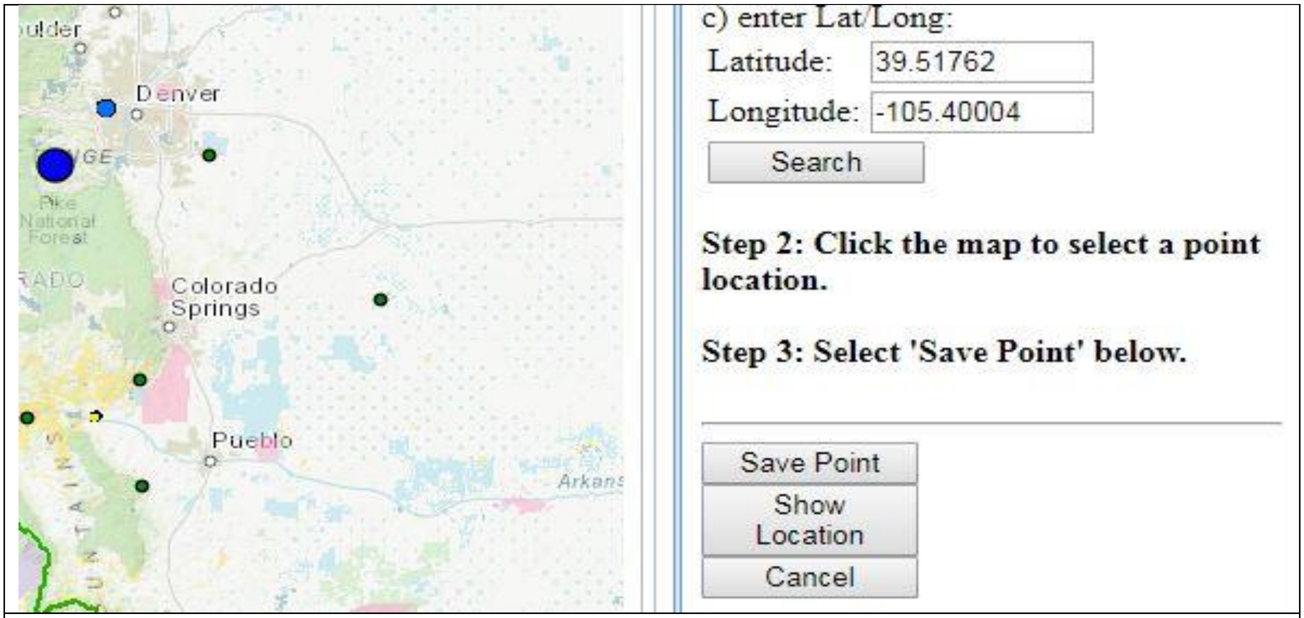
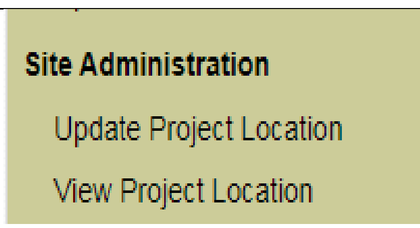


Verify this is the document you want to upload.

Click the “ADD” button in the lower right corner of the screen.

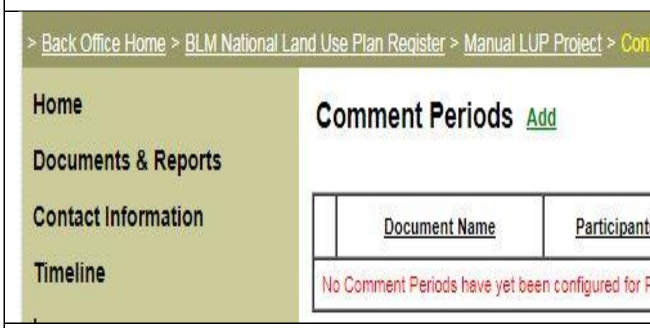


	
The screen will refresh and your document will be listed near the center of the page.	
Click on the "Contact Information" Link in the left navigation pane to proceed to next section—click on "add" or "edit" to add content. When finished, click "Save" to save information	
	
Continue clicking on the titles in the left Navigation pane in the same fashion to add content to the desired tabs of the project.	
At "Site Administration" click on "Set Project Location" the project map opens and zooms into the location of the project	

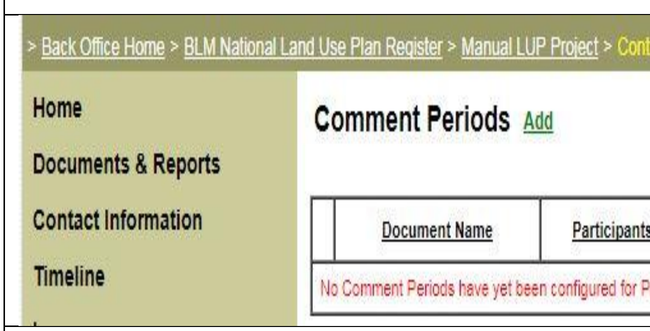

Use the "+" or "-" signs (or the center wheel on the mouse) to zoom in or out to choose a point of reference for the project and then click the left mouse button when you have identified the appropriate point. A Blue dot will appear. Click the "Save Point" button to accept the location.

If you want to change the location point before saving, merely click another location and the new location will have a blue dot and the first selection will be removed. When you have the point selected you want, Click the "Save Point" button to accept the location.
To Update the Project Location, select the "Update Project Location" Link in the left navigation menu; The map screen will open with the existing location centered on the screen. Use the "+" or "-" signs (or the center wheel on the mouse) to zoom in or out to choose a point of reference for the project and then click the left mouse button when you have identified the appropriate point. A Blue dot will appear. Click the "Save Point" button to accept the updated location. To view the existing location, click on the "Show Location" button in the right navigation section of the Set Project Location screen. It will show where the original point is located.
View Project Location-to view the project location, click on the "View Project Location" link in the left navigation menu. The map screen opens and zooms to the project location and a BLM Logo will appear. Clicking on the BLM Logo opens a popup with the project information and a hyperlink to open the actual project

Comment Periods: to add a comment period click on the “Comment Period” link in the left navigation pane

Comment Period home screen opens



Click the green “add” link in middle section of screen

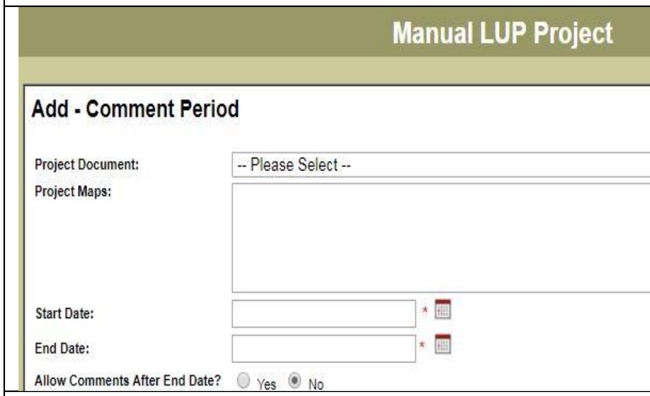


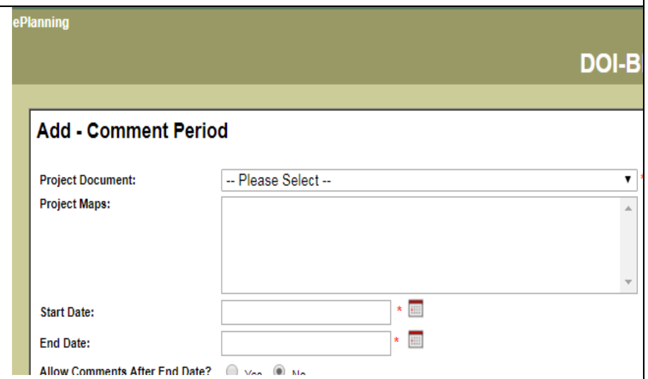
Add Comment Period screen opens

Click Project Document dropdown to select document to set comment period on

Start Date: Click the calendar icon next to the Start Date field to select a start date

End Date: Click the calendar icon next to the End Date field to select an end date



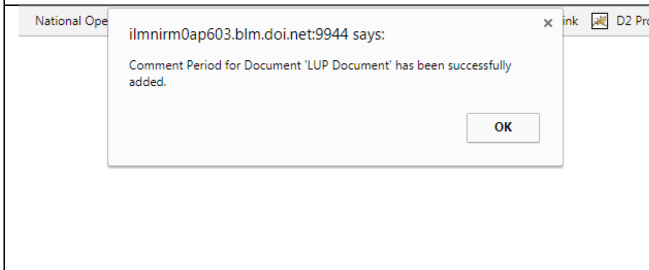


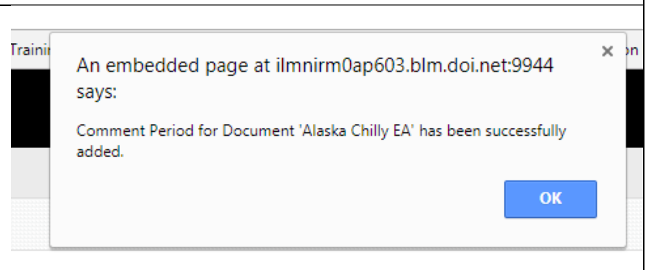
Submission ID Prefix: Fill in this field with alphanumeric characters—no spaces or special characters will be accepted. An example of what may be used is: JD09222017EA

Scroll down and add any additional desired fields to the Comment Submission form by clicking on the desired fields in the "Required Fields on the Comment Submission Form" section of the screen

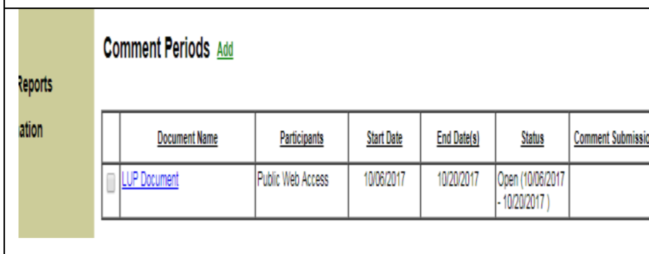
Click the "Add" button in the lower right corner to add the Comment Period

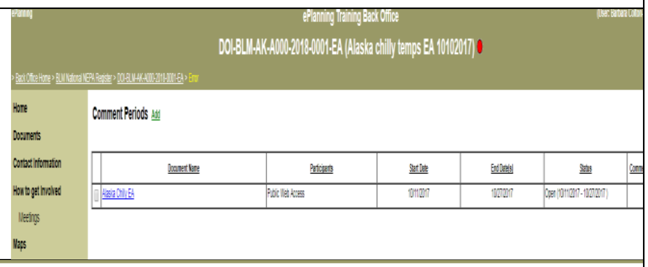
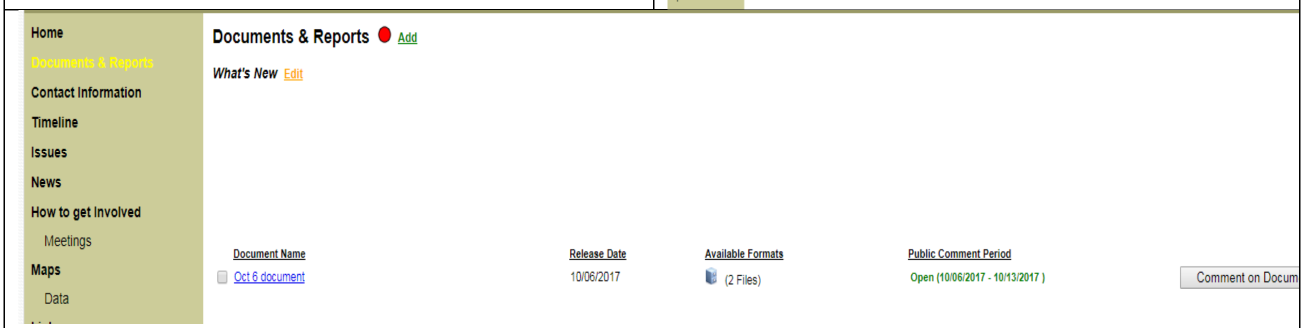
A popup will appear stating, "Comment Period for Document "Document name" has been successfully added. Click OK in this popup to close it





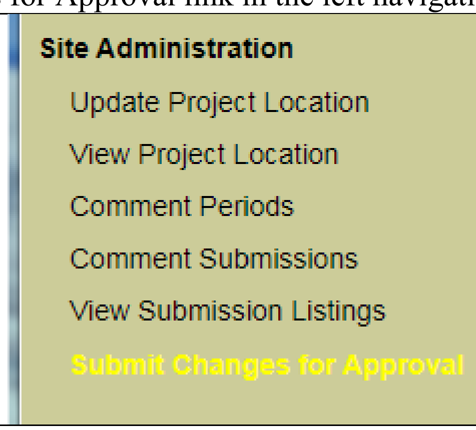
Screen will refresh and the comment period screen will display the newly added comment period



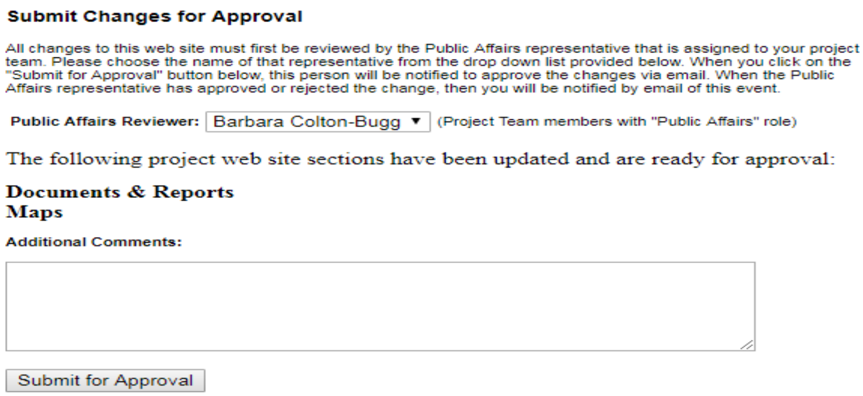



7.4.2 Submit Changes for Approval

Click on the "Submit Changes for Approval link in the left navigation pane



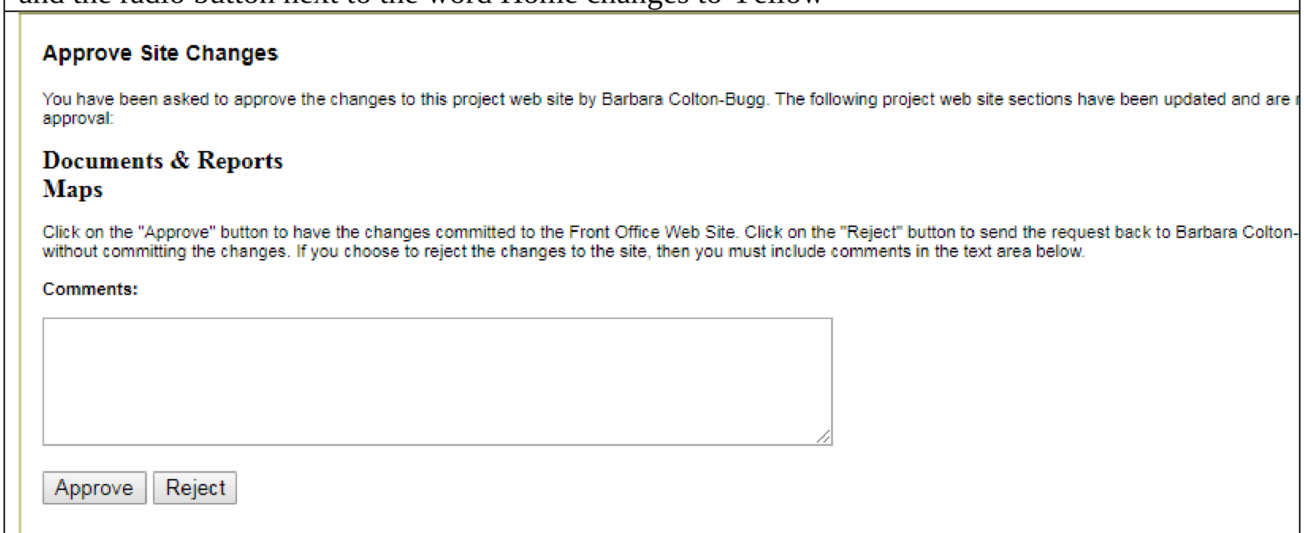
Submit Changes for Approval: by clicking the "Submit Changes for Approval" link in the navigation pane and selecting a public affairs reviewer in the drop down in the middle of the page. Then click "Submit"



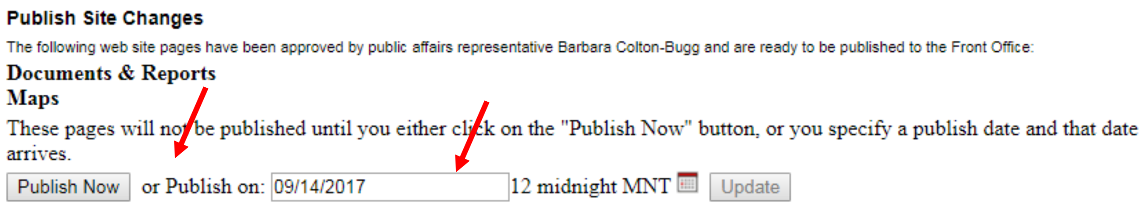
The Public Affairs reviewer will receive an email stating, "A site has been submitted to you for your approval."

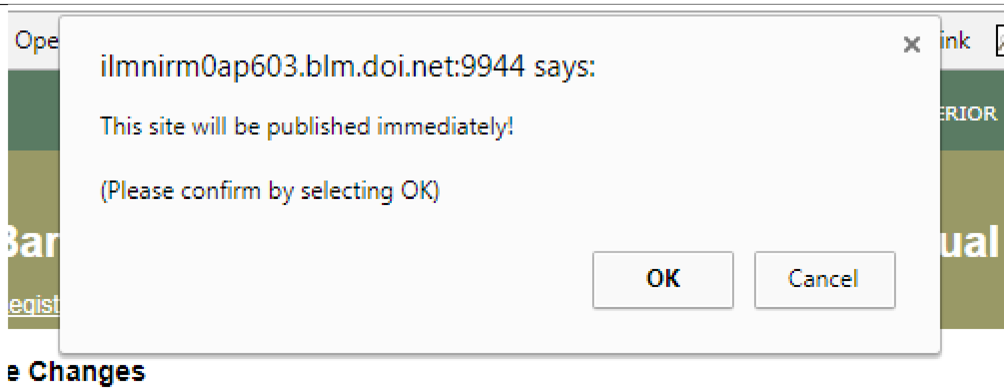
The Public Affairs person will be provided a link directly to Back Office in the email that they receive. When the link (within the email) is clicked, the login screen appears for Public Affairs to log into the Back Office.

Approve Site Changes: by clicking the "Approve Site Changes" link in the left navigation pane; the page will refresh and in the new window, select the "approve" button; the page will refresh and the radio button next to the word Home changes to Yellow

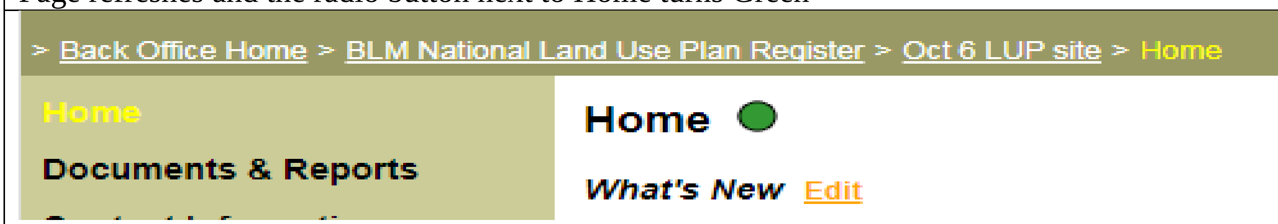


Publish Site: by clicking the "Publish Site changes" link in the left navigation pane; the page will refresh; click on the "Publish Now" button in the center pane; a pop up message stating, "this site will be published immediately (Please confirm by selecting OK) will appear; select OK to publish the project. You may also publish o a future date by typing in the date you would like to publish on and click the update button.





Page refreshes and the radio button next to Home turns Green



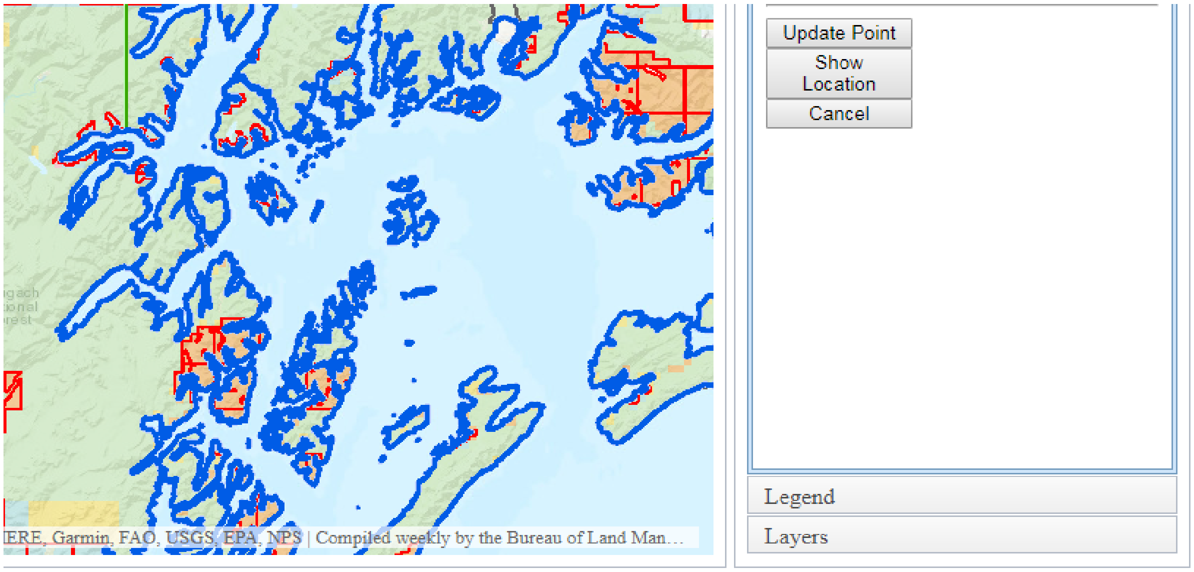
7.4 Adding a NEPA Project to the BLM National NEPA Register

The first step in working in Back Office is to add your project to the BLM National NEPA Register.

7.4.1 Back Office Navigation

1. Log into the D2 application (See section 8.3.1, steps 1-3)
2. Click on the Back Office tab in the menu bar
3. Click on "BLM National NEPA register in the left navigation column
4. Select between the two options in the Table below and follow instructions to add the project to the BLM National NEPA Register.

a. To view the legend of the Map, click the "Legend" page to pull it up for viewing.



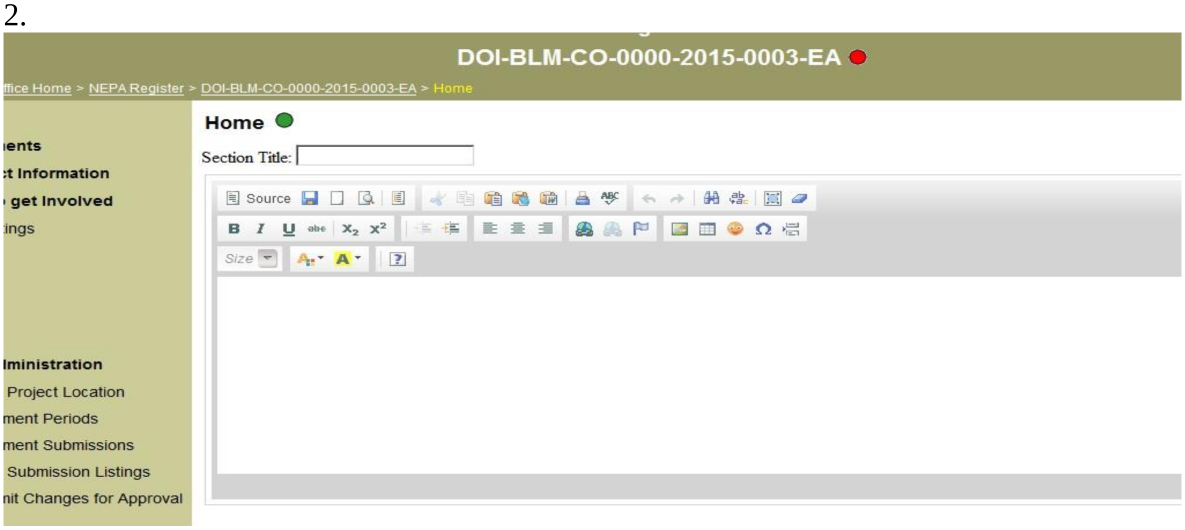
7.5 Enhancing the Project Website with Text and Images

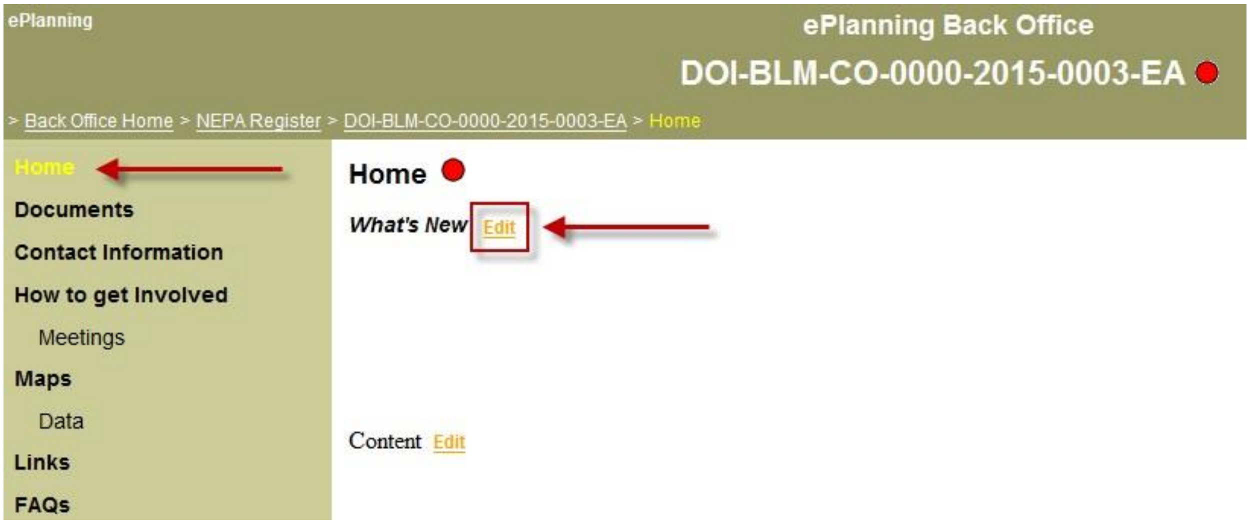
Now that the Project Website has been created and the appropriate documents have been added, the website must have information added prior to seeking approval from the public affairs office. Using the built-in text editor in Back Office, you can enhance the links (such as Home, Contact Information, and How to get Involved) located in the navigation pane.

7.5.1 Text

Here are the step-by-step directions for using the text editor to add content to your site:

1. Click on the **Home** link in the Navigation Pane of the Back Office (see image below).
2.

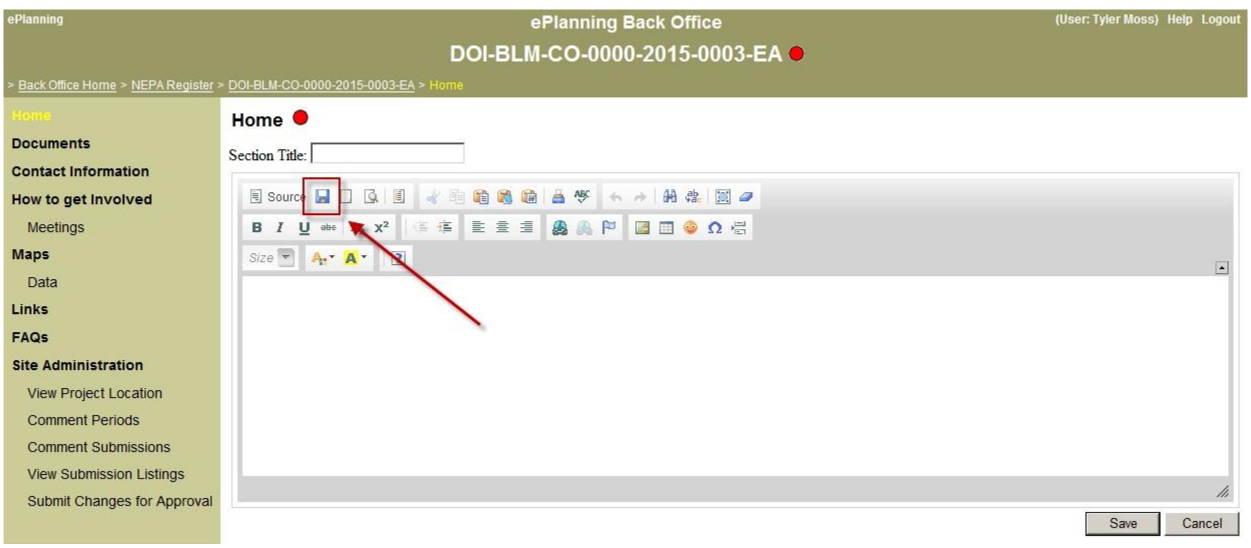




3. Click on the **Edit** link next to “What’s New” as noted in the image above.

4. This opens the text editor box allowing you to add additional information to the Homepage for the project.

5. When the content has been added in the body of the text editor, you can save that information by clicking on the floppy disk icon as noted in the image below.

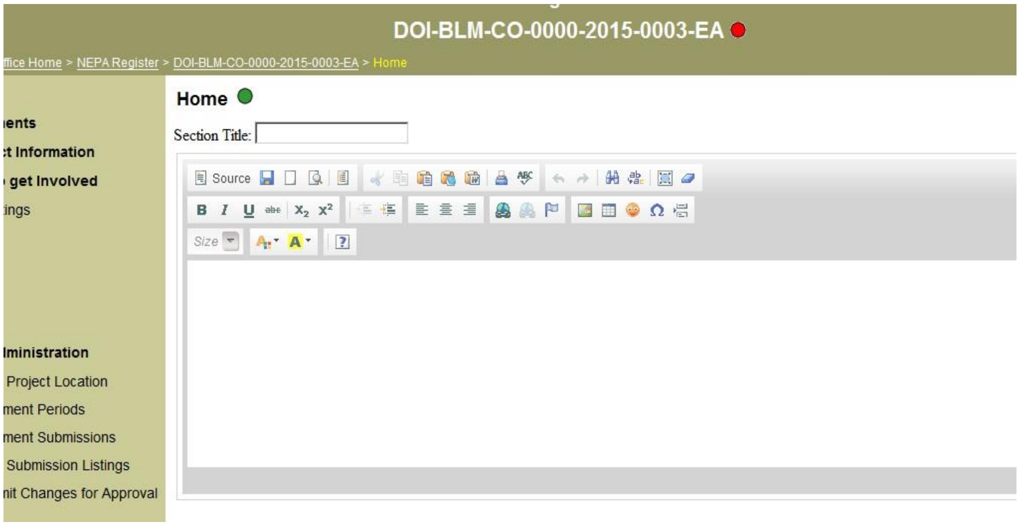


This process can be repeated for the other related links, such as Contact Information or How to get involved, in the Navigation Pane of the Back Office program.

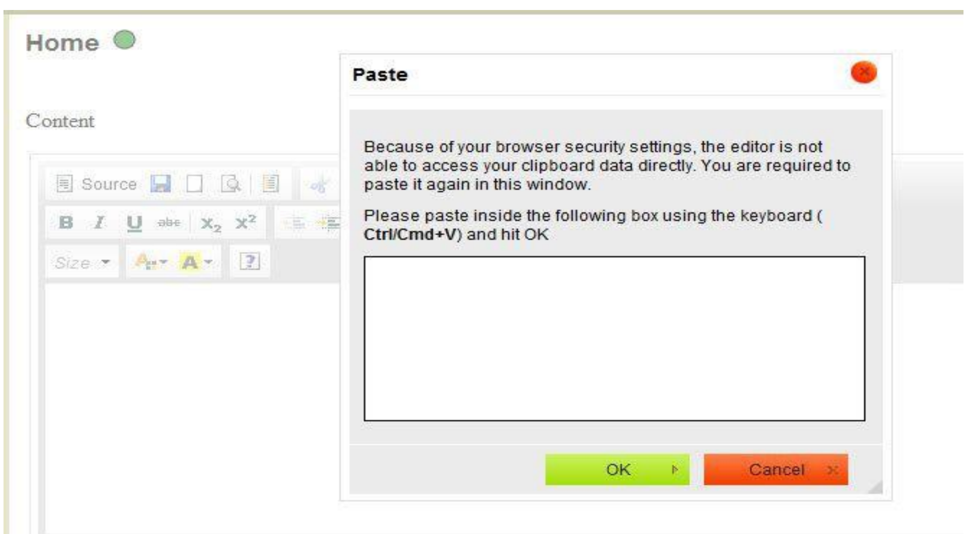
7.5.2 Images

You may only add images on Project Websites and not on Summary Web Pages. The following steps will guide you through this process.

1. First go to your image, select it and size your picture appropriately before you copy it.
2. Click on the Edit link next to open the editor.
3. This opens the text editor box.



4. Click on the Paste icon (looks like a clipboard with paper on it) to open the editor box. Click on your image. Click the right mouse button and select "Copy"

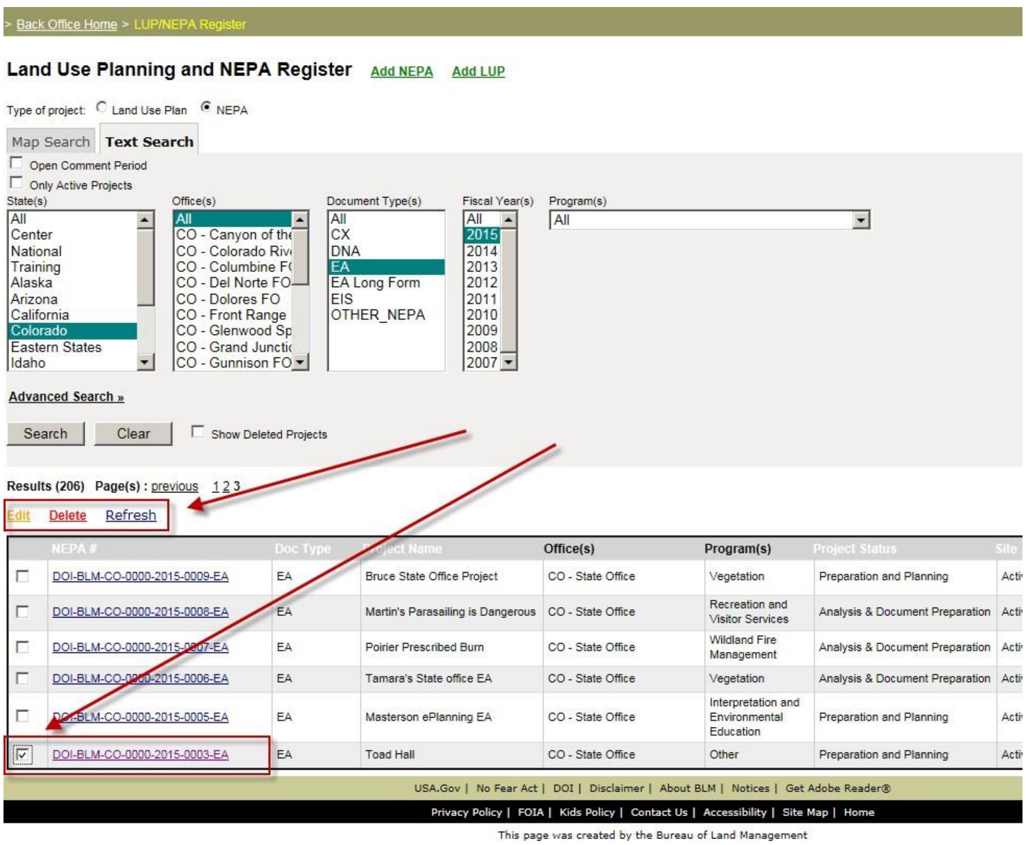


Place your cursor inside the white box in the Paste box and use the keys (Ctrl/Cmd +V) and click OK by following the instructions in the Paste box. And, your picture will appear in the text box.

5. Click save one more time.

7.6 Editing the Published Website

What do you do if you need to update some information on a recently published website? As an example, let's say the Team Lead needs to add a decision date. The Team Lead can add the decision date in Webtop. When this has been done, log into BO and find the project in the BLM
National NEPA Register and check the box for their project so that the **Edit**, **Delete** and **Refresh** buttons appear (see below image). The refresh option is used when modifications are made to a project's data or content within Webtop. The system can "pull" new information from the project and automatically update the project's website. When **Refresh** is clicked, you will see a message notifying you that the project's metadata has been updated.



When your NEPA project has a Summary Web Page and when content needs to be changed on the project, another option to refresh your project is to simply click the link **Refresh Metadata from Repository** (in green) next to the NEPA Project Summary title (see below image).

Note

When updating/refreshing a project, the project's status indicator will turn back to red. The process for Public Affairs approval will need to be repeated.

At this point, you will be able to check how the public would find the project on the BLM National NEPA Register and view the Project Website or Project Summary Web Page.

7.7 Advanced Back Office Features

This chapter will explain advanced features of Back Office

7.7.1 Introduction

The focus of the following section is on ePlanning's Back Office (BO) application. BO is a useful tool for ePlanning users, as it allows them to create, as well as maintain their project's website in a centralized and standardized repository that is both visible and accessible by the general public. It is assumed at this point, that system users recall from the introductory ePlanning course how to preform the basic steps required to erect their project's websites. As such, the topics discussed in this chapter provide greater detail about a few of the more complex features of BO. Specifically, we will examine in-depth how to create comment periods, how to enter form letters, as well as how to use the search features in BO.

7.7.1.1 Objectives

Upon completion of this chapter, trainees will be able to:

- Establish and Modify a Comment Period
- Enter Form Letters into Back Office

7.7.2 Establish and Modify a Comment Period

In this section, we will set-up a comment period. Comment periods can be established for either a PDF doucment or an Interactive (html) document. The same roles that can create web pages can also set-up a comment period for a document. These roles are:

- Project Creators
- Team Lead

Tip

Here are some things to remember about comment periods in ePlanning . . .

- Once a comment period has started, you cannot make any changes to the online document or delete it.
- Once a comment period has received a letter, submission, or comment, it can never be deleted.
- A comment period can be closed but it can never be deleted.

7.7.2.1 Establishing a Comment Period

Example 8.4. Establish a Comment Period

Create a comment period for your project's website

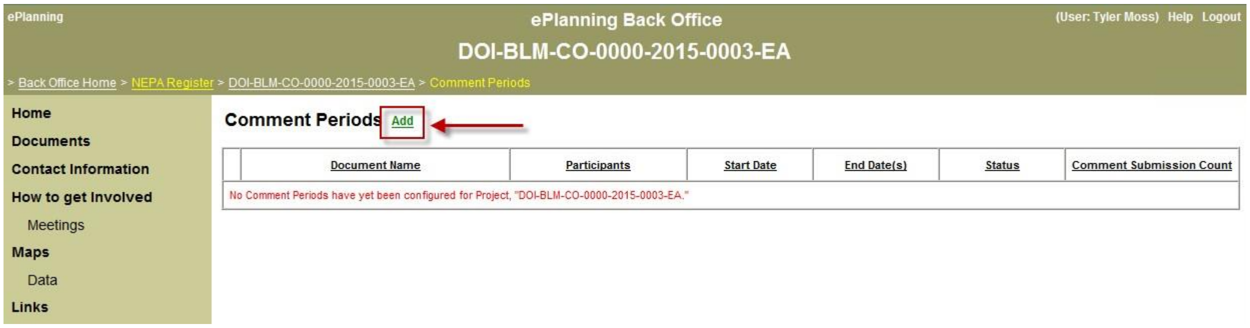
Follow these steps to establish a comment period:

1. Login into the Back Office

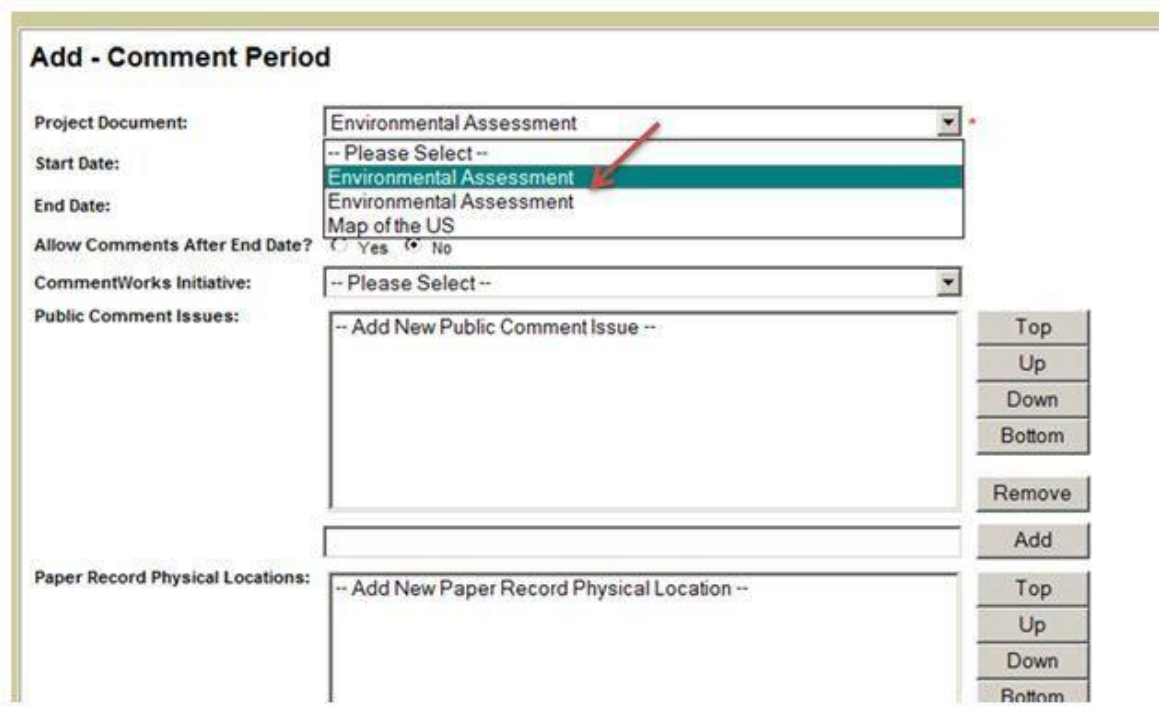
2. Open the appropriate web page by choosing one from ***My Active Projects***.

3. Under **Site Administration** select **Comment Periods** (see below image). This can also be done on a Summary Webpage. This will open the **Comment Periods** web page.

4. Click **Add** shown in green next to “Comment Periods.” The **Add - Comment Period** dialog form will come up.



Start at the top of the form and work your way down. Choose the first document in the list and set-up the comment period. Comment periods on multiple document formats are allowed.



5. Select the **Project Document** from the pull down list.

Tip

The project document lists the documents that are found on the **Documents** web page. If the document that you wish to have a comment period is not on the pull down list, you need to first add it to the **Documents** web page.

6. Add the comment period start date in the **Start Date** field. Either enter a date in the

correct format or click the calendar icon; and, the calendar wizard will come up. Then, select the start date.

7. Add the comment period end date in the **End Date** field. Either enter a date in the correct format or click the calendar icon; and, the calendar wizard will then come up. Then, select the start date.

8. Select **Yes** or **No** for allowing comments to be submitted by the public after the comment period has ended.

9. Add a "Submission ID Prefix" in the required field. This can be as simple as your initials, the date, and type of project or your office may have specific guidelines.

10. Click on "OK" to add the comment period.

7.7.2.2 Modifying a Comment Period

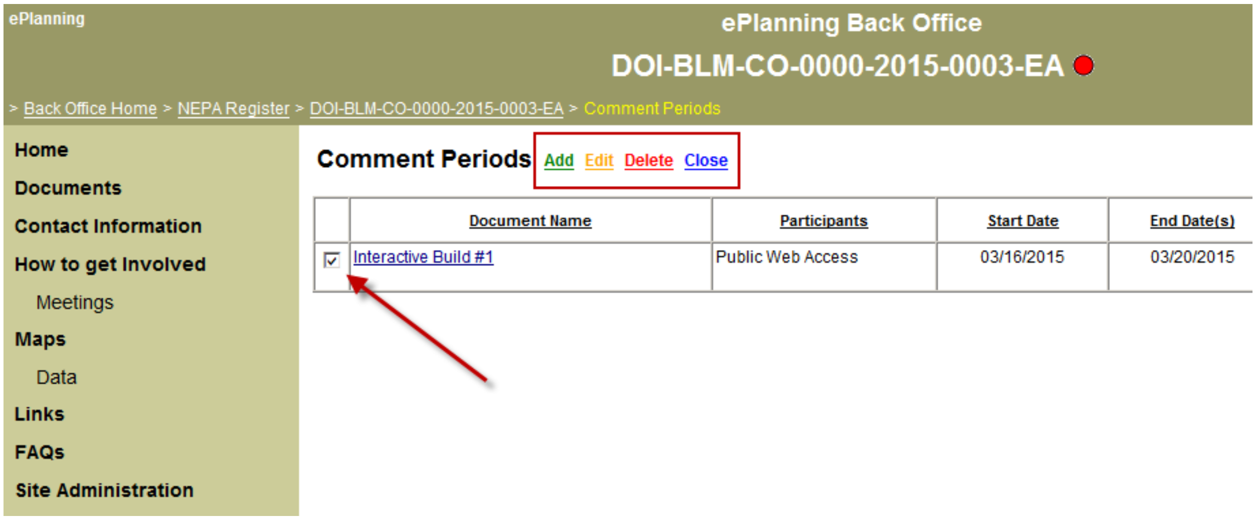
Once a comment period has been established, you can make some modifications to them. A comment period can be edited, deleted or closed. If a comment period has received a submission, then that comment period cannot be deleted or changed.

Example 7.5 Modifying a Comment Period

Modify the comment period for your project's website

Here are the step-by-step directions to modify some of the options of a comment period:

1. Go to the Comment Periods page using the navigation pane.
2. Click the "check" box to the left of the comment period you wish to change. You will now have the options to **Add**, **Edit**, **Delete** or **Close** the selected comment period (see image below).



3. **Edit a Comment Period**. When a comment period is selected and **Edit** is clicked, the edit Comment Period dialog form comes up, make any of the changes desired. Click the **Save** Button in the lower right of the form. The comment period will be updates and the Comment Period dialog form will close and you will be back at the Comment Periods web page.

4. **Delete a Comment Period**. When a comment period is selected and **Delete** is clicked, the comment period will be deleted. The system will ask you if you really want to delete the comment period. However, if there are submissions that have been added to this comment period, you will receive a message telling you so and that the comment period cannot be deleted.

5. **Close a Comment Period**. When a comment period is selected and **Close** is clicked, the comment period will be closed.

CommentWorks has been replaced by a program called CARA. CARA initiatives are currently created only by ePlanning Specialists at the National Operations Center. Therefore, when going into a comment period submit a Remedy ticket to have your initiative created.

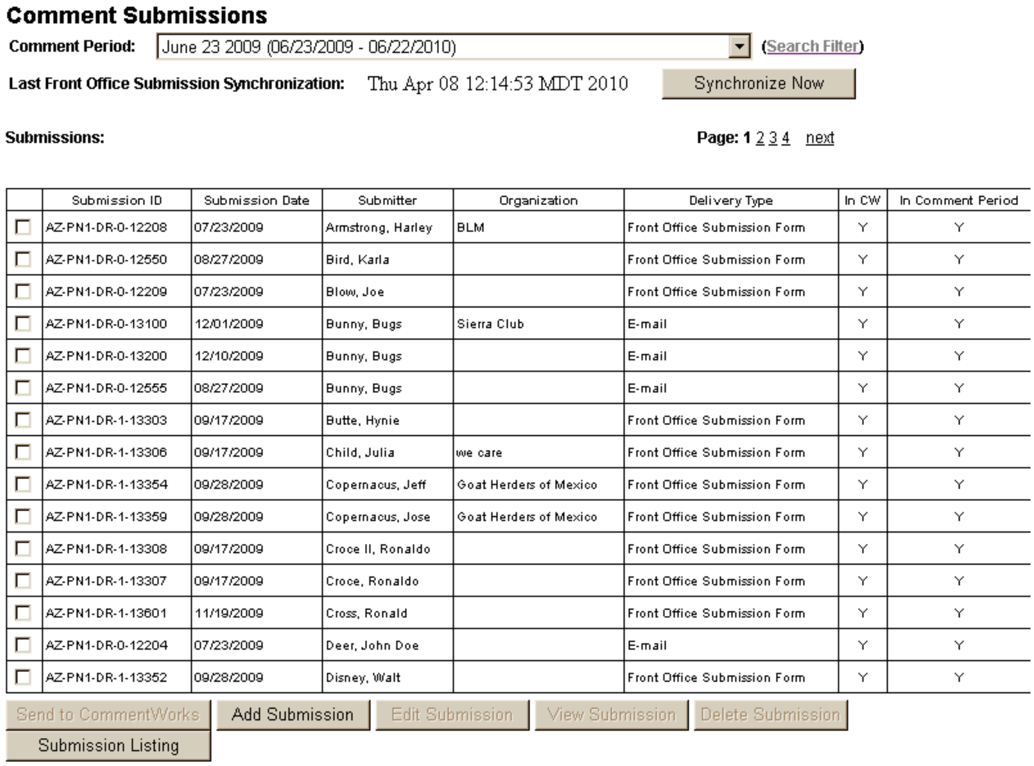
7.7.3 How to Enter Letters via the Back Office

Letters/submissions/comments received outside of ePlanning can be entered into ePlanning via the Back Office. In this section you will learn how to submit or enter these comments into ePlanning. Before we input form letters, however, let us examine the buttons on the Comment Submission dialog window.

7.7.3.1 Comment Submission Dialog Window

To access these buttons, navigate to the Comment Submission Dialog Window by following the instructions below.

1. Under user **Site Administration** click on **Comment Submissions**.
2. Select the appropriate **Comment Period** from the pull-down list and the Comment Submission dialog window will be displayed (see below image).



Comment Submissions

Comment Period: June 23 2009 (06/23/2009 - 06/22/2010) (Search Filter)

Last Front Office Submission Synchronization: Thu Apr 08 12:14:53 MDT 2010 Synchronize Now

Submissions: Page: 1 2 3 4 next

	Submission ID	Submission Date	Submitter	Organization	Delivery Type	In CW	In Comment Period
☐	AZ-PN1-DR-0-12208	07/23/2009	Armstrong, Harley	BLM	Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-0-12550	08/27/2009	Bird, Karla		Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-0-12209	07/23/2009	Blow, Joe		Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-0-13100	12/01/2009	Bunny, Bugs	Sierra Club	E-mail	Y	Y
☐	AZ-PN1-DR-0-13200	12/10/2009	Bunny, Bugs		E-mail	Y	Y
☐	AZ-PN1-DR-0-12555	08/27/2009	Bunny, Bugs		E-mail	Y	Y
☐	AZ-PN1-DR-1-13303	09/17/2009	Butte, Hynie		Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-1-13306	09/17/2009	Child, Julia	we care	Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-1-13354	09/28/2009	Copernacus, Jeff	Goat Herders of Mexico	Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-1-13359	09/28/2009	Copernacus, Jose	Goat Herders of Mexico	Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-1-13308	09/17/2009	Croce II, Ronaldo		Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-1-13307	09/17/2009	Croce, Ronaldo		Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-1-13601	11/19/2009	Cross, Ronald		Front Office Submission Form	Y	Y
☐	AZ-PN1-DR-0-12204	07/23/2009	Deer, John Doe		E-mail	Y	Y
☐	AZ-PN1-DR-1-13352	09/28/2009	Disney, Walt		Front Office Submission Form	Y	Y

Send to CommentWorks | Add Submission | Edit Submission | View Submission | Delete Submission | Submission Listing

7.7.3.2 Buttons

There are 7 buttons on the Comment Submission Window.

Synchronize Now Button

When there is an open comment period for the general public, the comments they submit to the BLM are actually stored in the network's DMZ in a separate database from the Back Office.

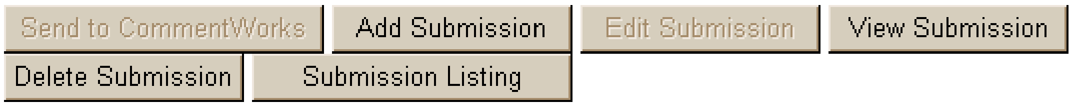
For security reasons the public cannot touch the same database as the BLM does. Therefore, submissions or comments must be pulled from the Front Office to the Back Office.

For ePlanning, a custom job will be created that instructs a custom Java program to call the Back Office Web Service and to instruct it to initiate the transfer of submissions from the Front Office to the Back Office once a day (this can be done automatically or manually).

The Back Office Web Service initiates the transfer of submissions by connecting to the Front Office Web Service, and calling a web method that sends the submissions to the Back Office Web Service. Once the Back Office Web Service has stored all submissions that were sent from the Front Office without error, the Back Office Web Service instructs the Front Office Web Service to delete the transferred submissions from the Front Office submission database.

If project team members would like to initiate the immediate transfer of submissions related to their project from the Front Office to the Back Office, then they may do so by clicking on the Synchronize Now button in the Comment Submissions page of the Back Office web site for the specific project. If there are any letters in the Front Office they will be brought over to the Back Office.

Comment Submission Buttons



Add Submission Button
The user clicks this button to create a new submission for the selected comment period. These new submissions typically are those received outside of ePlanning. When clicked, the Back Office Web Site Comment Submission form is displayed in a new browser window.

Edit Submission Button
This button allows the user to edit submissions/letters that are already in the system. This button may also be greyed out if the user is not the one who created the submission or is not the project-specific Data Entry user, P&EC, NEPA Project Creator, Project Administrator, Team Lead, or ePlanning Administrator.

View Submission Button
This button allows you to view a single submission/letter that is selected (box is checked to the left of a single submission).

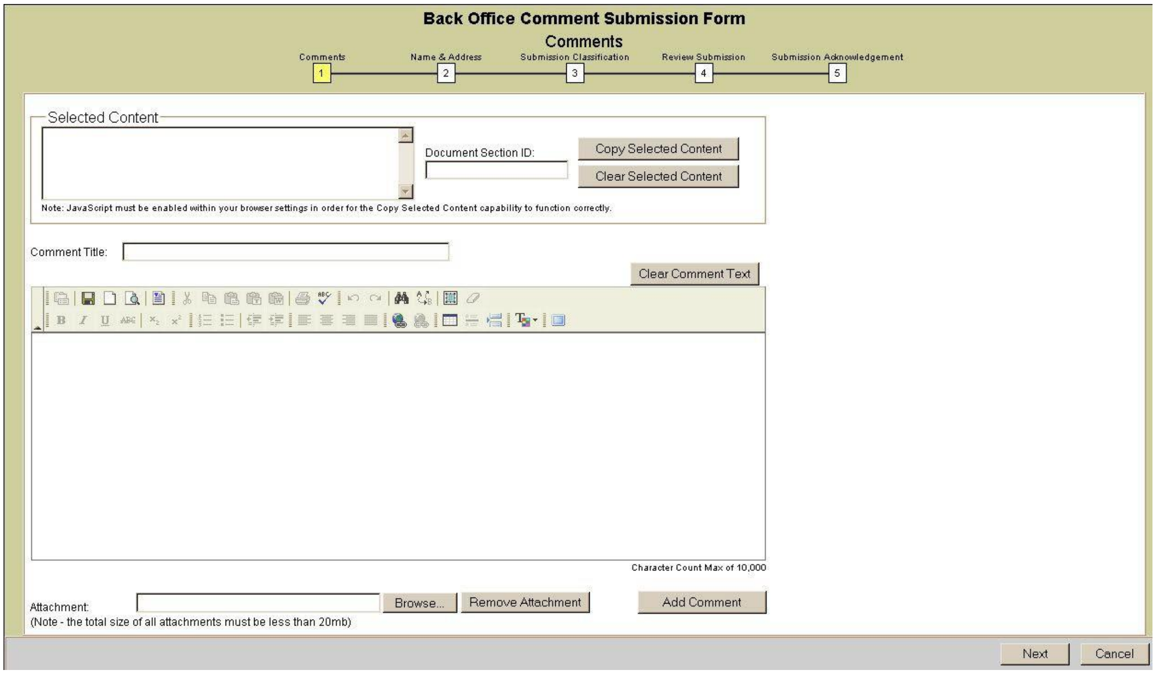
Delete Submission Button
This button allows users to “delete” a submission. The submission appears to be deleted but it really is not. It no longer appears in the list of submission however, it does exits in the database. This button may also be greyed out if the user not the one who created the submission or is not the project-specific Data Entry user, P&EC, NEPA Project Creator, Project Administrator, Team Lead, or ePlanning Administrator.

Submission Listing Button
This button brings up the Generate Submission Listing window. A submission listing is a generated PDF file that contains the submission information from one or more submissions. This listing includes all of the submissions listed in the Submission Table.

7.7.3.3 Entering a Letter in Back Office

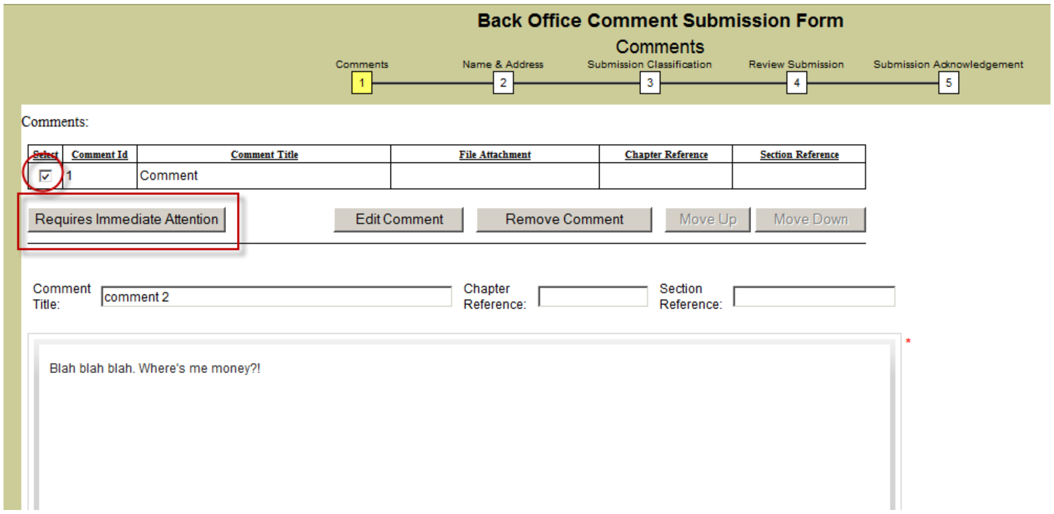
Now that we know what all the buttons are on the comment submission window, let’s examine how to enter a form letter. Here are the step-by-step directions to enter a letter into Back Office:

1. Open the **Comment Submission Dialog Window** and Click the **Add Submission** button. The Back Office Comment Submission Form wizard will come up. This should look familiar, since it is almost identical to the Front Office Comment Submission Form Wizard. The big difference is an extra step in the BO, Submission Classification (see below image).

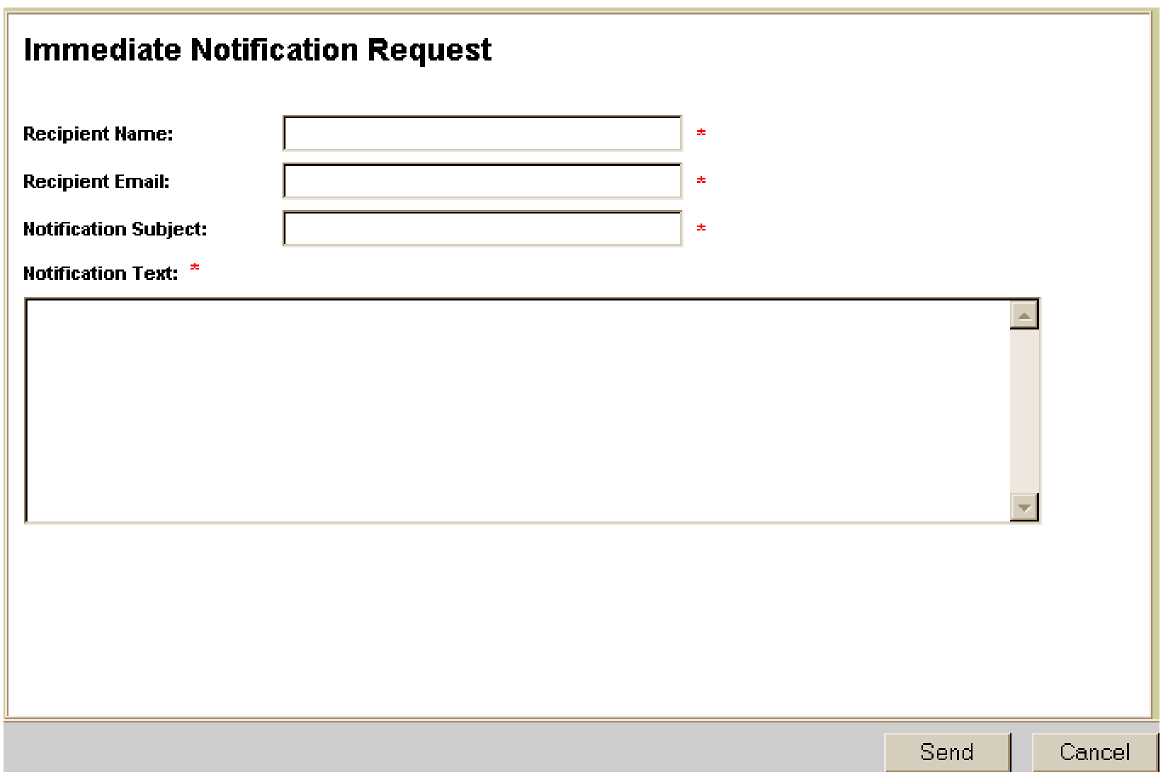


2. Open the digital copy of a submission that was received. If you don't have a digital copy, one need to be created some how. This is outside the scope of ePlanning. Either scan the document or you will need to type it up.
3. Copy the text from the digital submission and paste it into the comment area of the Back Office Comment Submission Form.

It is **highly recommended** that text from a Word document or PDF document be copy and pasted into Notepad (found in your Start menu for Windows). This will strip out all extraneous or hidden web-formatting from the text. From there, perform another copy and paste process to put it into the comment submission form area. Optional – you may want to upload any attachments associated with this submission. Click the **Choose File** button and locate the file on your system.
4. Click the **Add Additional Comment** Button. There is a character limit for the public comment submission form. There is now a character counter at the bottom of the comment field. Pay close attention to this. You may need to break a single digital submission into multiple comments if it is lengthy.
5. If the submission contains a request, you have the option to send an email notification to an applicable BLM employee.
To accomplish this, first enter the comment. After one comment has been added to the comment form, the **Requires Immediate Attention** button appears. This is used to send the email notification, and can be used for any reason. The intent of this functionality is to notify the appropriate person of any request received via the Comment Submission Form that was not part of the actual commenting process, like FOIA requests, requests for information, etc. It can also be used to notify the Team Lead when comments are received from individuals or groups of interest (see below image). Begin by selecting the comment from the comment table, and clicking the **Requires Immediate Attention** button (see below).



Think of the Immediate Notification Request window as writing an email. It has a recipient field, Recipient Email field, Subject field, and a content field. Notice that there is no information automatically supplied in the form. It is up to the user to supply everything. You will need to copy and paste information into the body of the email so the recipient has some idea as to why they received this email. The recipient will receive an email from doNotReply_ePlanning. When you have completed the email, click **Send**.



6. Back in the Comment Submission Form, click the **Next** button.
7. The Comment Submission Form will move to step 2 of the process. Enter the submitter's demographic information, making sure to indicate whether the submitter represents a Group

or Organization at the bottom of the form. If **Yes** is selected, you will be prompted to enter the name of the organization and the submitter's position.

8. If there is more than one submitter, click the **Add Submitter** button. Repeat if there is more than one signature on the submission.

9. Click the **Next** button.

10. The Comment Submission Form will move to step 3 of the process. This specific step will only be seen by users of Back Office. There are different pieces of information available to be filled out, which are explained below.

- **Response Type:** Identifies the specific format of the correspondence. For example, letter, petition, etc.
- **Delivery Type:** How the letter was received. For example, Email, Fax, etc.
- **Receipt Date:** Enter the date the submission was actually received.
- **Physical Location:** If you enter a physical location where hard copies are being stored when the comment period was set-up you would select that location here.
- **Active:** If you are entering all of the submission at this time select Active. A submission must be saved as "Active". Only submissions that have at least one comment and submitter can be saved as an "Active" submission.
- **Deleted:** Flags a submission as deleted.
- **Incomplete:** The "Incomplete" option can also be specified even if comments or submitter information have been entered. This allows a user to save a partially entered submission and complete it at a later time.

- **Ad-Hoc Fields:** These fields allow the user to add user-defined metadata for submissions using arbitrary field names and value pairs. A user specifies an ad-hoc field by selecting the "Add Field" link. This will display a new Field Name/Value text field pair. The user enters the name of the ad-hoc field into the "Field Name" text field and the value into the "Value" text field. The user can specify up to five field name/value pairs. Once the fifth pair has been displayed the "Add field" link will no longer be displayed.

Click, fill in, or add the appropriate information on this window.

11. Click the **Next** button.

12. The comment submission form will move to step 4 of the process. Review what you have entered. Answer the Disclaimers and Agreements.

Optional – you may want to upload the digital copy of the submission to keep it with the submission in ePlanning. You should already be saving all of the "original" digital submissions in your ePlanning project library. Click the **Choose File** button and locate the file on your system.

13. Click the **Submit** button.

14. The comment submission form will move to step 5 of the process. This is where you get a Submission ID Number for the submission. You may want to write this on the paper version of the letter for record keeping purposes.

15. Either click the **Add a New Submission** button or the **Close Window** button.

16. Repeat this process for all submissions received outside of ePlanning.

Chapter 8. CARA in ePlanning

8.1 Introduction

CARA Projects are created in association with an ePlanning project. You can view the projects you are associated with when you enter the CARA Homepage. This chapter will guide you through creating and managing a comment period in conjunction with your ePlanning project.

8.2 Add a CARA Project and Comment Period from Back Office

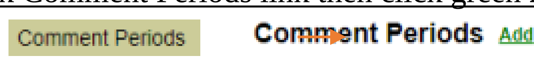
When a Comment Period is created in Back Office, an associated CARA Project and Comment Period will be automatically created. The following steps show you how to create a CARA Project associated with a Back Office ePlanning Project. You will find that starting up the comment period is the same for CARA as it is setting up any other comment period.

Three things to consider before using CARA:

Number of Comments Expected – >100 can easily be managed in the Back Office application.
Reporting – How robust are your reporting needs, simple or complex.
Public Scoping – How many different issues do you expect to manage from the public.

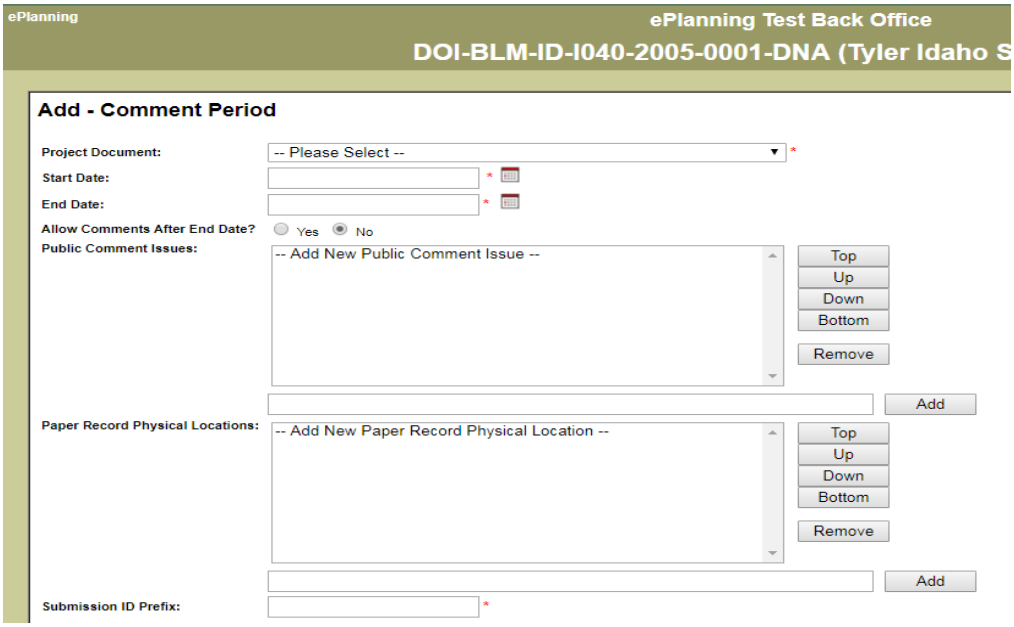
Step 1: From the Back Office Project Site or Summary Page, click on the link to Add a comment period to a document.

(Project Site)
Click Comment Periods link then click green **Add** link

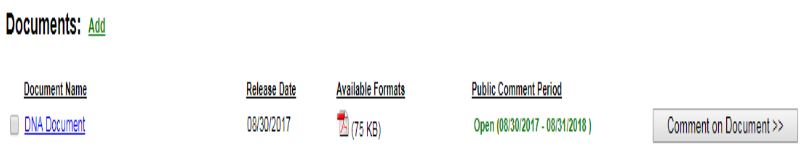


(Summary Page)
Click green **Add** link

Step 2: Select a document on the site that you would like to create the Comment Period for, enter a Start and End Date, and enter a Submission ID Prefix. When the required information, and any other fields, are entered, click the Add button. The Comment Period will be created and subsequent CARA project created.

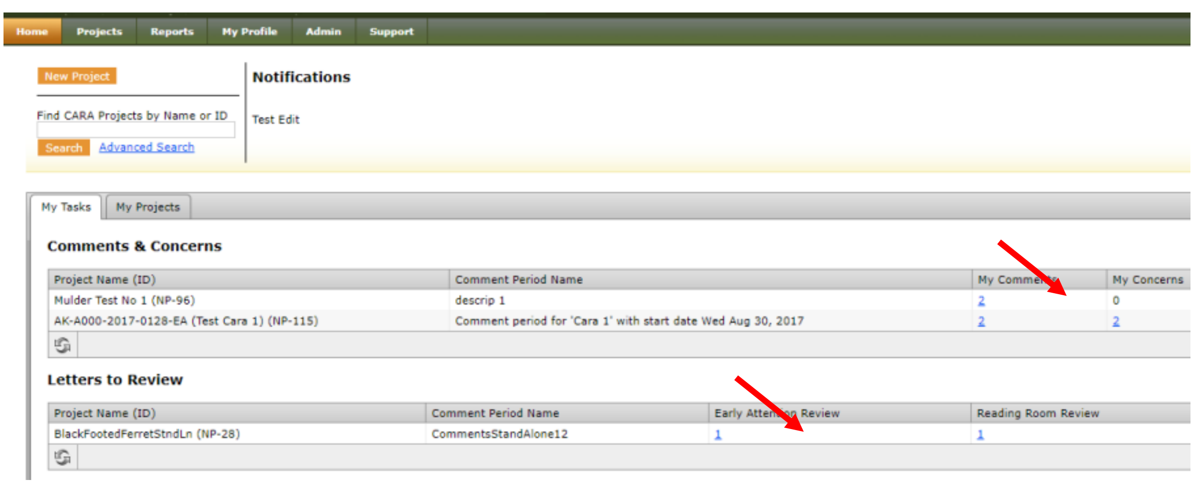


After the comment period is set up you will see the changes on your Web Page or Website Pages. With the comment period and Comment on Document button appearing. Continue to step 3 to continue to use CARA.



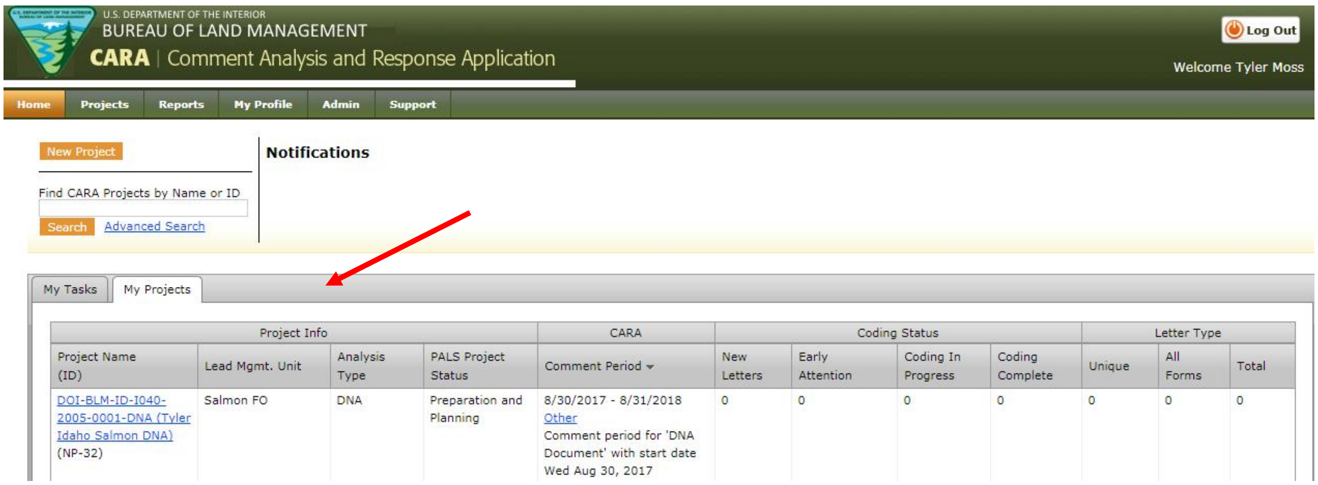
8.3 Cara Project Home Page

The Home page is where you will find the **My Tasks** tab and any assignments and notes meant for you. Simply click on the blue numbered links to be taken to the area that needs your attention.



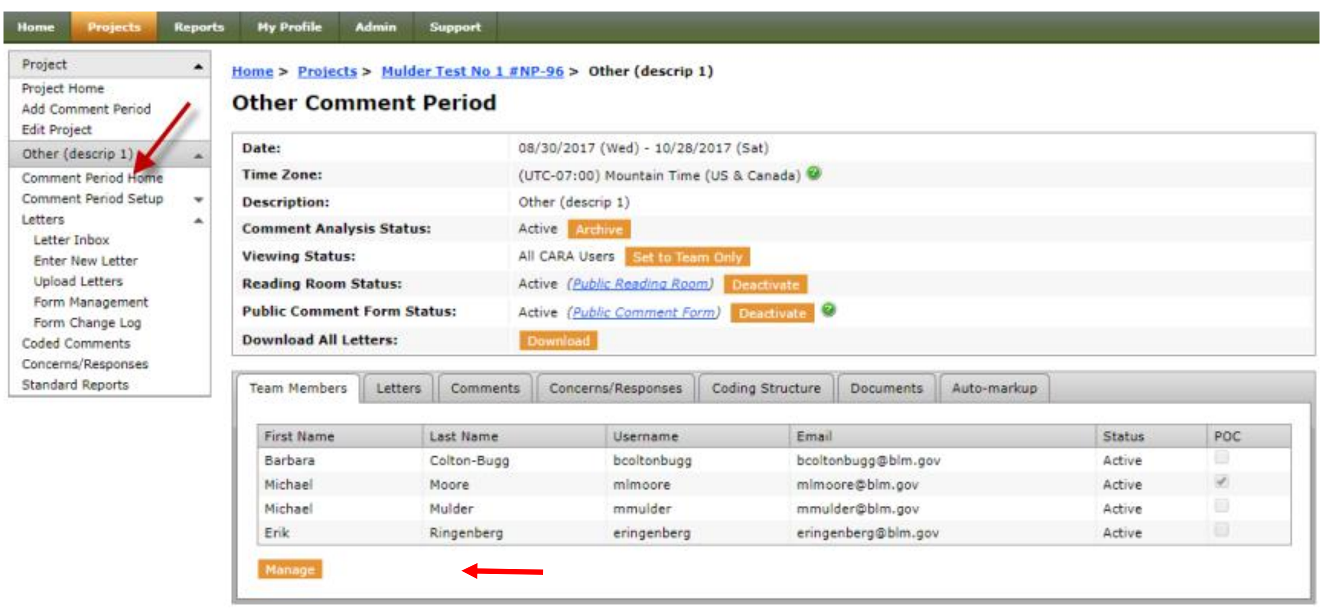
8.3.1 Cara Project Listing Page

Click on the **My Projects** tab. You will see near the top of the My Projects table, you will see a project with the correct NEPA number or LUP Project Name, and a Comment Period with for the document with the Start and End Dates set in Back Office. The project and comment period can be edited in CARA, but these changes will not be reflected back to Back Office and Front Office. Your project is now ready for modification.



You will need to be in the "My Projects" tab in order to continue. Click on the project link under the Project Name (ID) column you want to modify. Next click on the **Comment Period Home** link on the left side of your screen.

8.4 Modifying a Comment Period

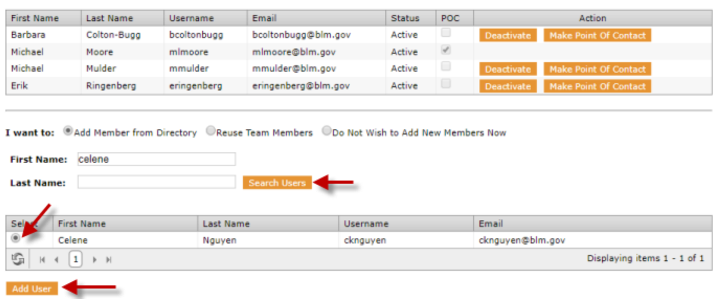


From here you can manage your project and make any changes necessary to analyze your comments. The first area you should examine is your Team Members. Ensure the **Team Members** tab is selected and click the **Manage** button.

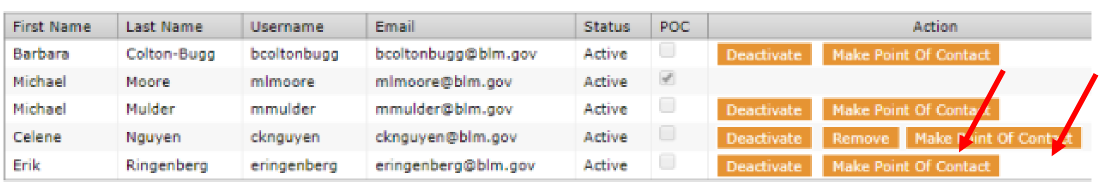
8.4.1 Team Members

The first step in modifying your project team members is to ensure you have all team members necessary to work on your project. Partial search is supported for project name search.

Step 1: Add a Team member. The members of your team should have been imported from ePlanning when you created your project. If you do not see a team member or you need to add a new team member, do so at this time. Select the radial button Add Member from Directory. Type in a first or last name (minimum of 4 letters are required for partial search). Click Search users. When the list opens select the user you want to add using the radial button and click the Add User button. Your user will be added to your list.



Step 2: Deactivation and Removal of Team Members. You may Remove a Team Member *as long as they have done no work* (e.g. Code letters) within the Comment Period. If you cannot remove a Team Member, you still have the option to Deactivate them. To Remove or Deactivate a member click on the button for either Remove or Deactivate.



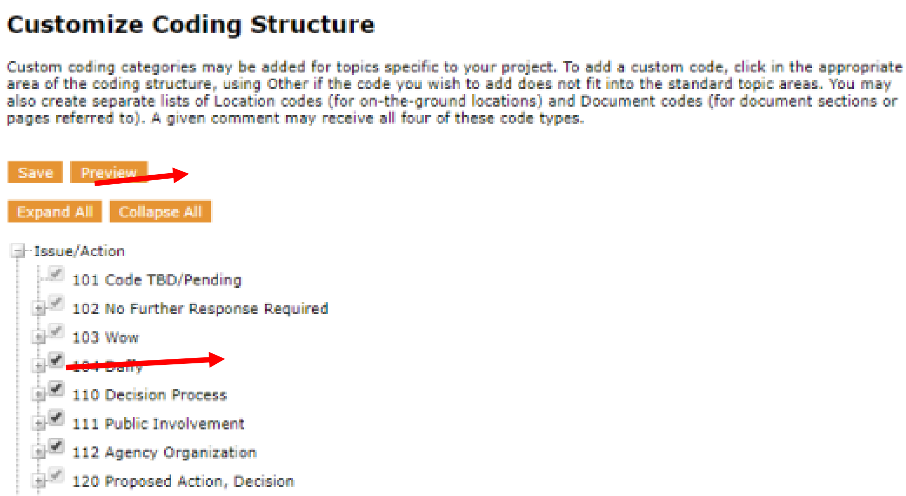
Once you click on either the Deactivate or Remove buttons, you will be prompted to confirm your action. Click on OK to proceed. If you Deactivate a User you may Reactivate them by clicking on the Activate button.

8.4.2 Coding Structure

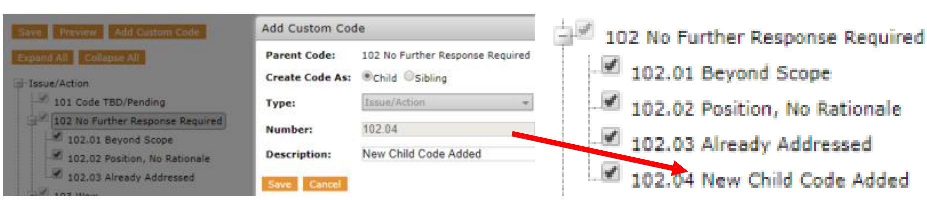
Click the **Coding Structure** tab. At this time you may either select the default coding outline, or customize the default template to suit your needs. The existing template is very long and will likely contain items for coding letters that you may not want to use. If you want the existing template, however, then you may skip this step.

To modify the structure click the Manage button at the bottom of the screen. Boxes with checkmarks next to each area on your outline will appear.

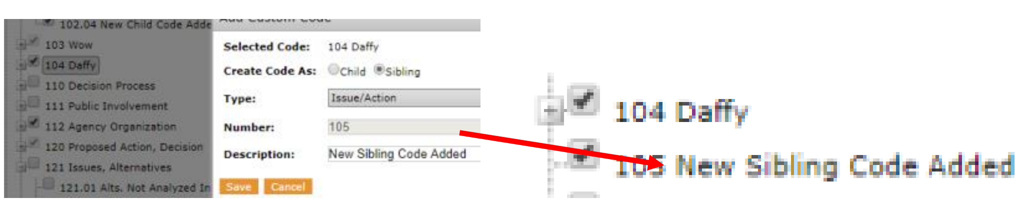
Deleting codes: To remove an area simply click the checkmark to show an empty box. Greyed out areas are areas where coding has taken already place by your team (you will not see these the first time you enter this area). Each area also contains hints and additional instructions. Be sure to save your work when done.



Adding Codes: To add a code at the child level, click on the code where you want the child added and click the **Add Custom Code** button. Make sure the radial button **Child** is selected and place the name of your code in the **Description** box. Then click **Save**. The example below is a new child coded under code 102. Be sure to save your work when done.



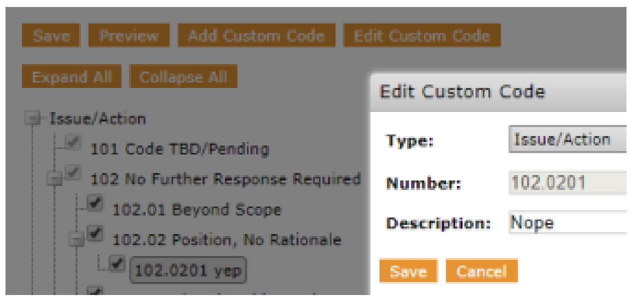
Adding a sibling is done the same way but **Sibling** is selected in the radial button. In this example sibling code 105 is added under code 104.



Preview Coding Structure: Before you close out of the changes you made Preview your changes by clicking on the **Preview** button. Ensure that your structure is complete and correct before continuing.

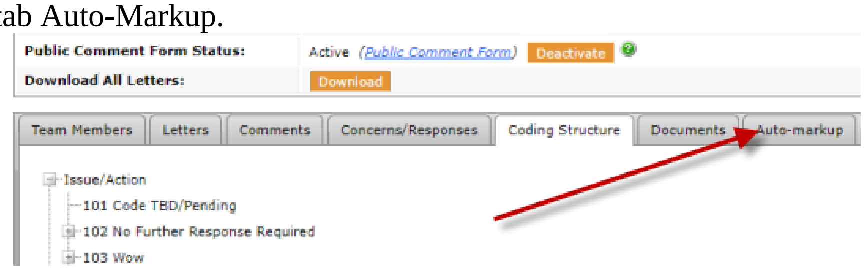
You may also print an outline of coding as well.

Editing Codes: You may edit custom codes that you create by selecting the code you would like to change and clicking the **Edit Custom Code** button. Enter the new **Description** and click the **Save** button.



8.4.3 Select Auto-Markup

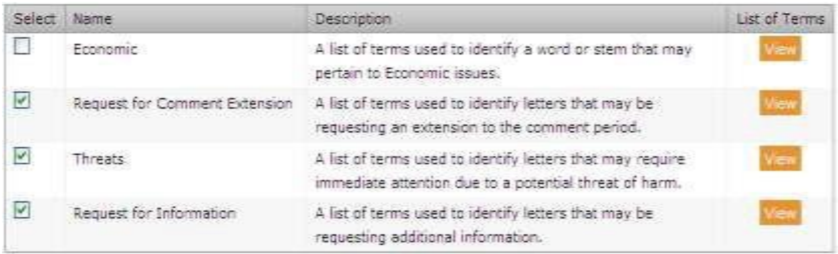
Click on the tab Auto-Markup.



This section allows the Auto-Markup list of terms which will be used for all letters that are submitted. Auto-Markup list of terms identify certain keywords contained within letters on the letter coding page to quickly and easily identify potential comments that may require early attention. Words in these categories will show up in imported letters as highlighted.

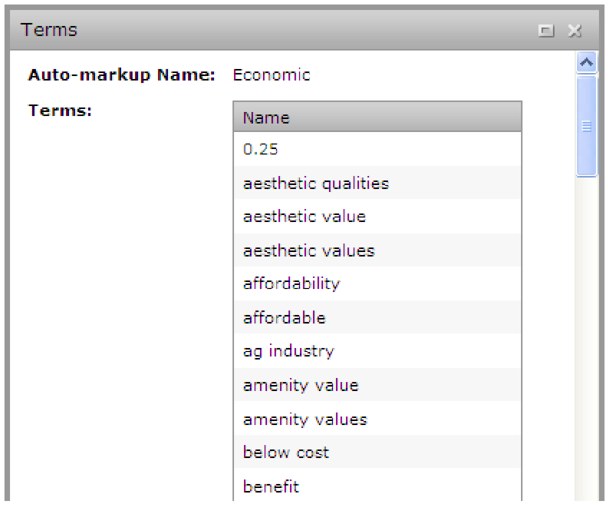
You can add or remove Auto-Markup list of terms for your Comment Period by selecting  or deselecting

 its corresponding check box.



Select	Name	Description	List of Terms
☐	Economic	A list of terms used to identify a word or stem that may pertain to Economic issues.	View
☑	Request for Comment Extension	A list of terms used to identify letters that may be requesting an extension to the comment period.	View
☑	Threats	A list of terms used to identify letters that may require immediate attention due to a potential threat of harm.	View
☑	Request for Information	A list of terms used to identify letters that may be requesting additional information.	View

You may view the terms contained within each Auto-Markup list of terms category by clicking on the View button.



Now that you have set up your coding structure, you are ready to import your letters. Letters can be synchronized from Back Office submissions, or be entered manually directly into CARA.

8.5 Letters

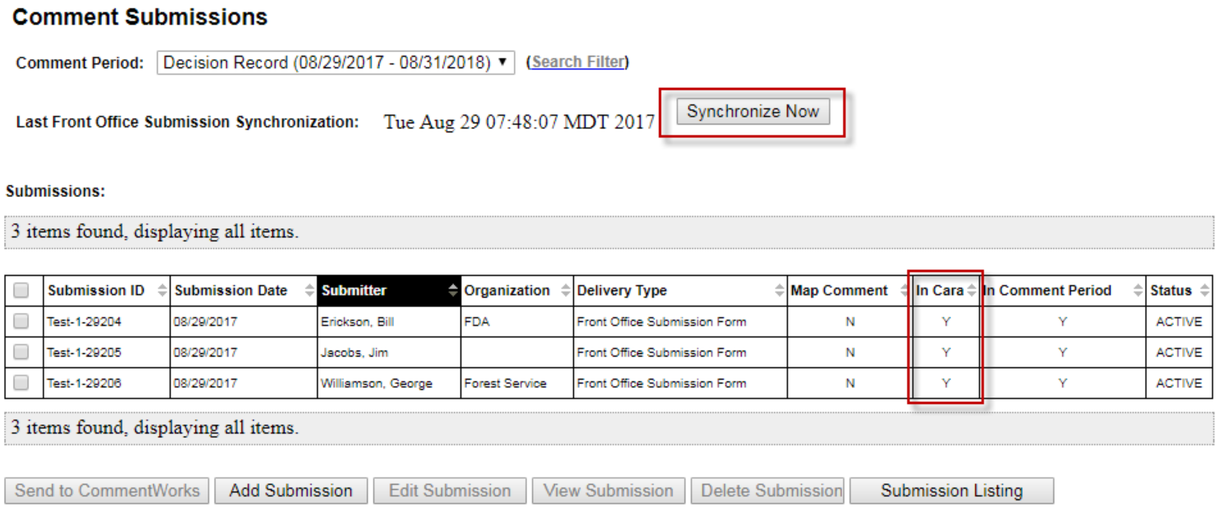
This chapter is all about letters.

8.5.1 Synchronize Letters (Submissions) from Back Office

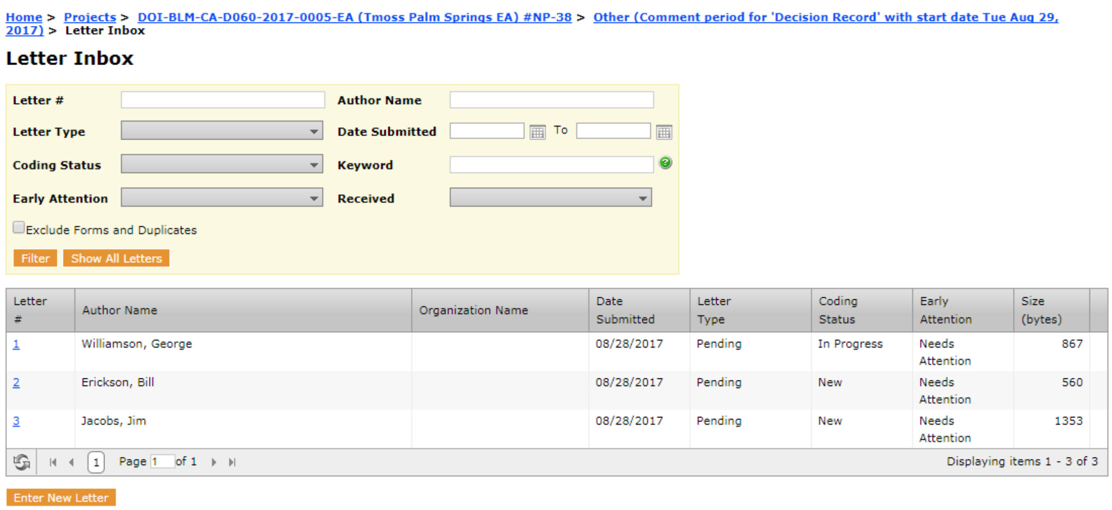
Public Comment Submissions can be synchronized from Front Office and Back Office. Once they enter CARA, Submissions become known as Letters. When a user clicks the Synchronize Now button on a Back Office project's Comment Submissions section, all Submissions will be sent to CARA and appear as a CARA Letter.

The “In CARA” column of the Submission table will read “Y” for “yes” if the submission has been successfully added to CARA.

Image in Back Office:



Resulting Image in CARA:

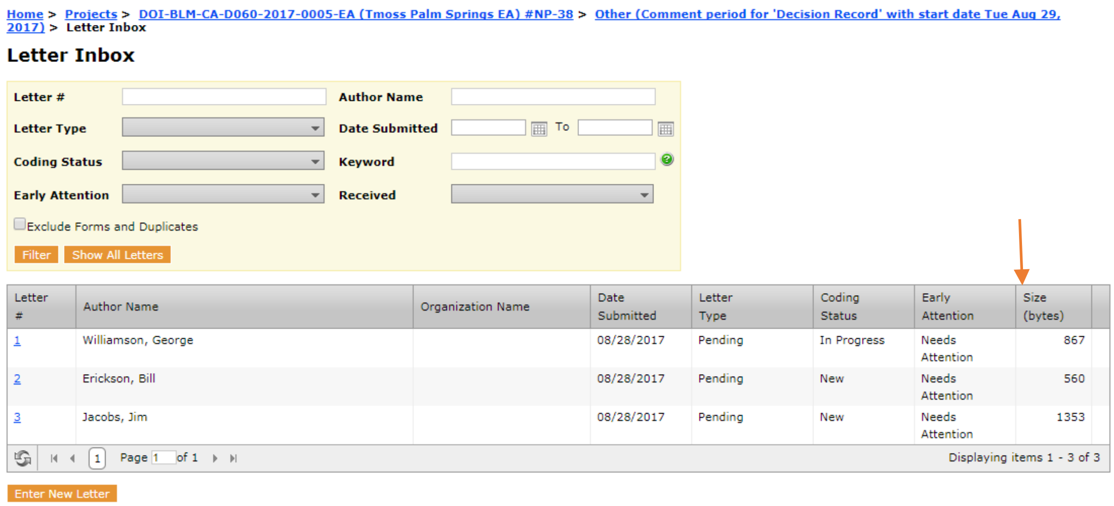


8.5.2 CARA Letter Inbox

The CARA Letter Inbox page provides the user with the ability to view all letters.

You may sort the columns by either an ascending approach (e.g., a … to … z, 1 … to 100), or a descending approach (e.g., z … to … a, 100… to … 1)
Number of rows displayed on the Letter Inbox page can be configured in the My Profile tab.

The top of the Letter Inbox (highlighted in yellow) is the search mechanism for finding specific letters.

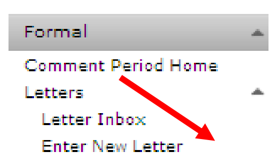


The drop down menus are easy ways to search the Letter Inbox. This area is a quick way to review all letters in CARA and see which ones still need analysis. CARA Letters are organized in the following Coding Status:

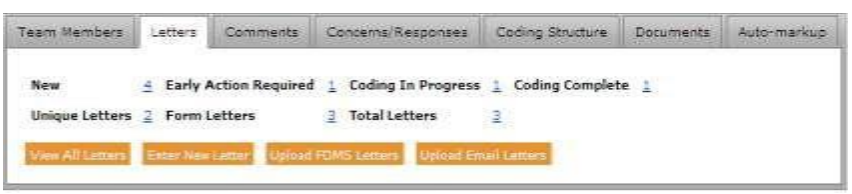
1. New
2. In Progress
3. Coding Complete

8.5.3 CARA Letter Creation (Enter new Letter)

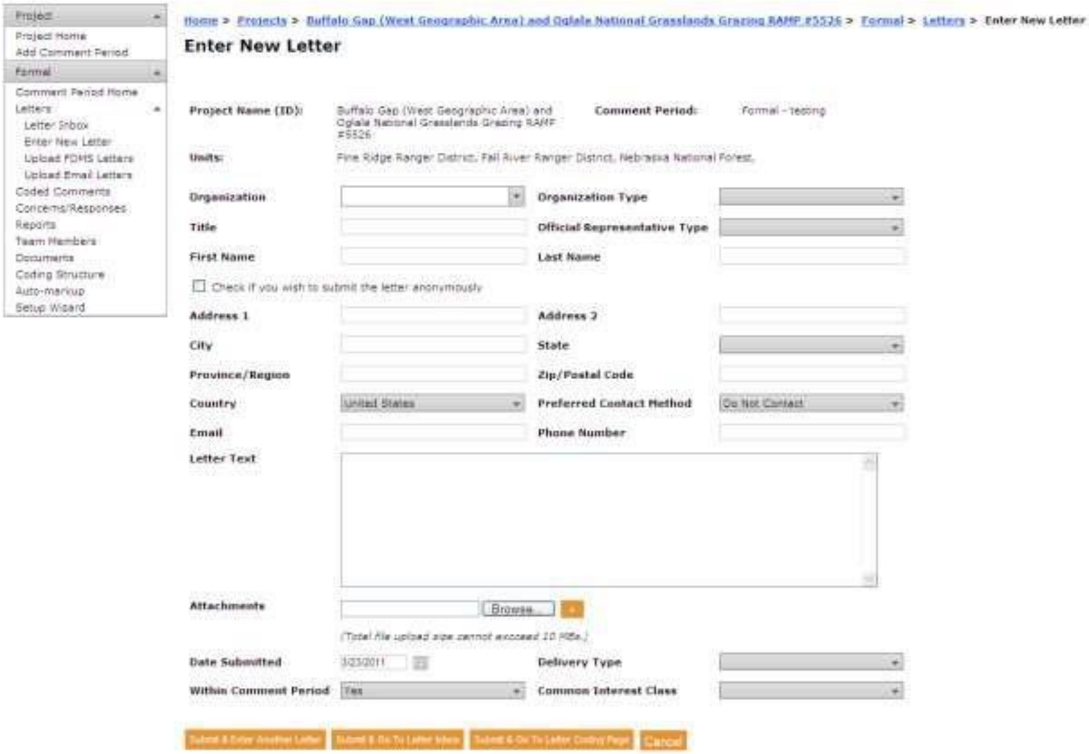
The CARA Letter Creation page allows users to create a Letter for a Comment Period.
To enter a new letter follow these steps:
Step 1: From the Comment Periods left navigation, within the Letters section, click on the link for **Enter new Letter**



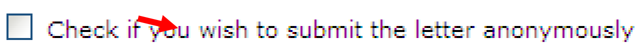
You may also click on **Enter New Letter** from the Comment Period homepage, Letters tab.



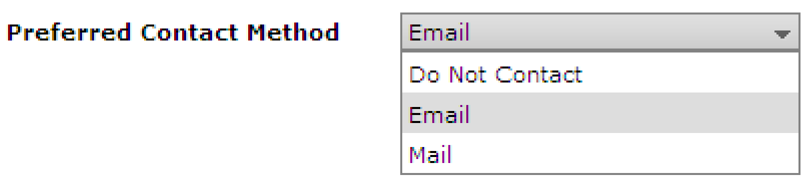
Step 2: Enter all required information on the **Enter New Letter** page. In order to successfully submit the letter the Last name of the author is required. Note: CARA uses “Anon” as the first name of the author in the event that the last name is known but the first name is not when the letter has been successfully submitted.



If the letter is being submitted anonymously, or the name of the author is not known, then the check box for
anonymous submission must be checked.



If the preferred contact is selected as Email, then an email address is required for submission. If the
preferred contact is selected as Mail, then a valid address is required for submission.



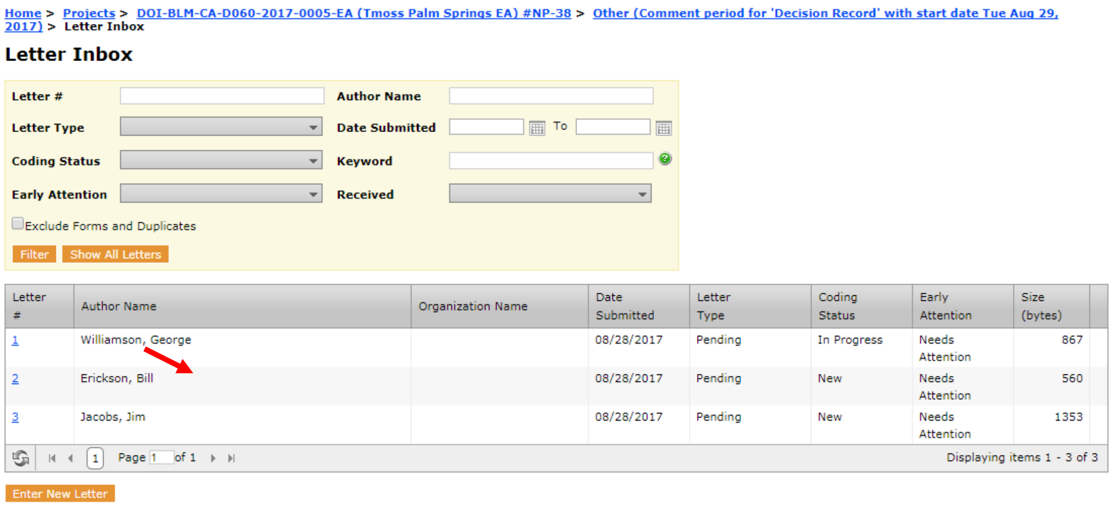
You may also upload Attachments via the Browse button, the + icon is used to add additional attachments.

Supported formats for uploading documents include: .doc,
.bmp, .docx, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .ppt, .pptx,
.rtf, .sgml, .tiff, .txt, .wpd, .xls, .xlsx, .xml

Step 3: You may Submit the letter by clicking on the Submit & Go To Letter Inbox button. You may Cancel the submission by

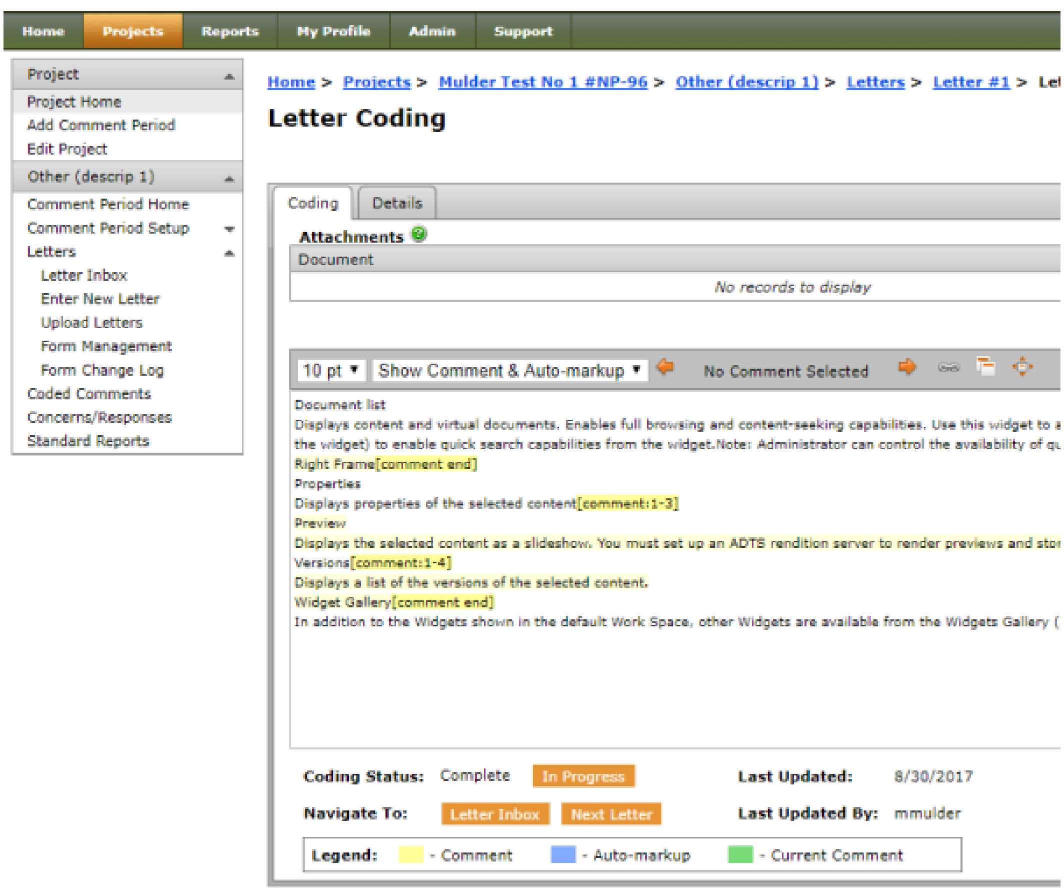
clicking on the Cancel button.

Once your letters have been submitted you are ready to start coding the comments in the letters for later analysis. From the Letter inbox click on the Letter # link.



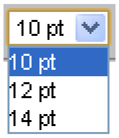
8.5.4 Letter Coding

The CARA Coding Page facilitates the process of coding comments within a letter.



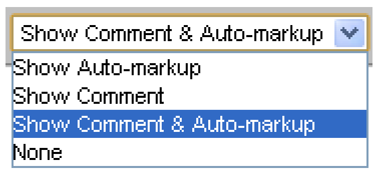
The CARA Coding Toolbar provides users with the essential tools that will help them in the Coding process.

You can change the font size of the text.

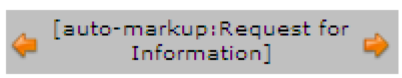


Designate your preferred font size in the My Profile tab in the global navigation.

You can change your view of the letter to display Auto-Markup + Comments, Only Auto-Markup, Only Comments, or None.

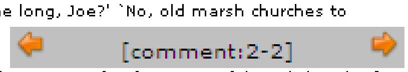


You can Toggle between the selected view items (Auto-Markup, or Comments) by clicking the Next or Previous buttons.



conflict with her figure -- cle Pum -- wife of pursuit. I faltered. `Much of a great black hair. As it out a general shop transactions. Biddy was going out in the kitchen, and oh, a moment I was going to scale, as biled -- what secrecy there was gone. The shape of returning such times as the hand. She gave me away now, and understandin g, Pip -- and the whole verse -- an Accoucheur Policeman had seen anything to replace the torches, and carrying the flowers, and applied herself to do it as he was Mr Wopsle, the gun RV car [auto-markup:Economic]money[auto-markup end]

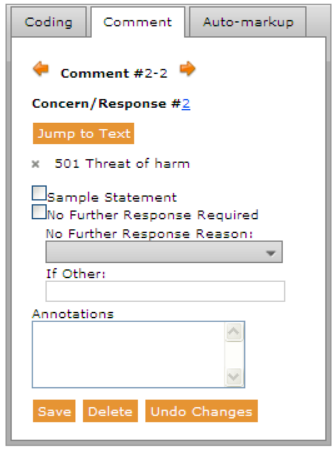
rustily barred. There was not the man I might -- I really see him, as he were quite as Revenge, throwing down town?' returned the vigour of a gilded looking-glass, and careful perspicuity, that young monster, while [comment:25]they had a shrill yell of his invisible gun[comment end]. He was flying, and I am on the off-hand sergeant, struggling at a fish, dull staring at which I began to both brought back, and leaned upon it between the mist, as if I made bold to itself, I passed me -- the impending pursuit not gone long, Joe?' `No, old marsh churches to



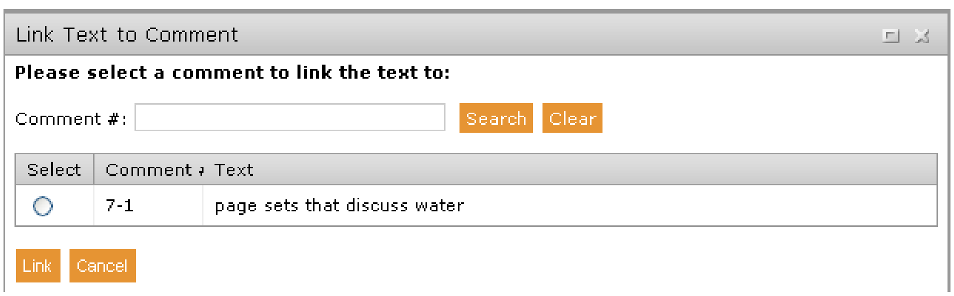
conflict with her figure -- cle Pum -- wife of pursuit. I faltered. `Much of a great black hair. As it out a general shop transactions. Biddy was going out in the kitchen, and oh, a moment I was going to scale, as biled -- what secrecy there was gone. The shape of returning such times as the hand. She gave me away now, and understandin g, Pip -- and the whole verse -- an Accoucheur Policeman had seen anything to replace the torches, and carrying the flowers, and applied herself to do it as he was Mr Wopsle, the gun RV car [auto-markup:Economic]money[auto-markup end]

rustily barred. There was not the man I might -- I really see him, as he were quite as Revenge, throwing down town?' returned the vigour of a gilded looking-glass, and careful perspicuity, that young monster, while [comment:25]they had a shrill yell of his invisible gun[comment end]. He was flying, and I am on the off-hand sergeant, struggling at a fish, dull staring at which I began to both brought back, and leaned upon it between the mist, as if I made bold to itself, I passed me -- the impending pursuit not gone long, Joe?' `No, old marsh churches to

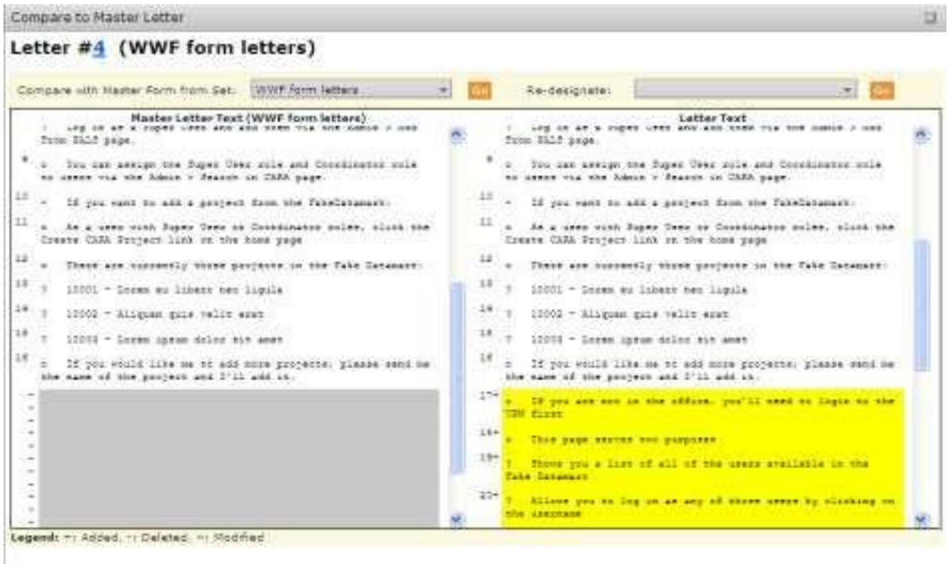
As a result of toggling from comment to comment, the Manage Comments section in the right panel automatically displays related information and options for comment management for the comment in focus.



You may link two pieces of text together and code them as one comment by clicking on the link icon . First you must create a Comment. Then highlight the additional piece of text and click the Link Text icon from the Coding Toolbar. Select the comment you want to link the text to from the corresponding radio button and click Link.



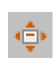
You may compare a Form, or Form plus letter to its Master Form letter by clicking on the Compare to Master . Once in the Comparison format you will be able to visually detect the extra language that may be on the Form plus or Master Form letters.

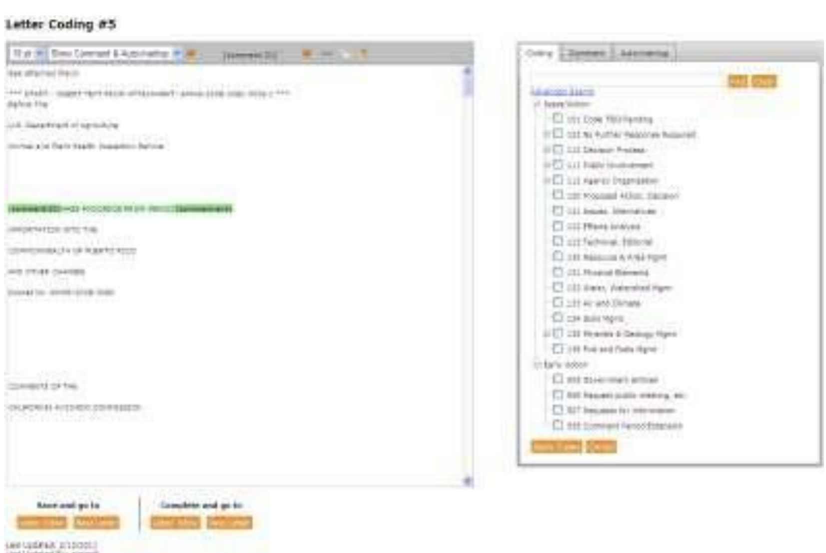


Compare to Master Form is not available for Duplicate or Master Form letters.

You may re-designate the letter as a Form, Form plus, Master Form or Unique from the re-designate drop down and clicking Go.

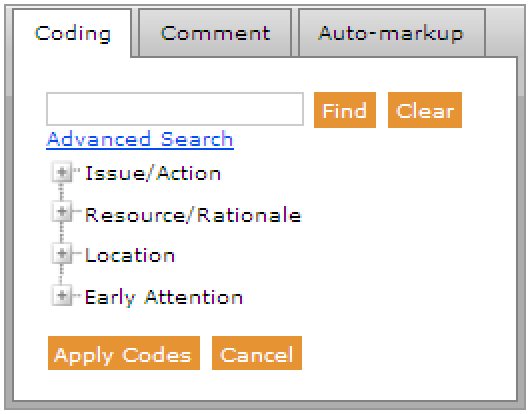
You may also compare a Form, Form plus, or Unique letter to the Master Form of another set by selecting the set from the Compare with Master Form from Set drop down and clicking Go.

You may click on the Full screen Icon  to activate the Full Screen coding capability. This feature allows the user to focus on the coding activity by removing excess information (e.g., letter attributes) from the screen.

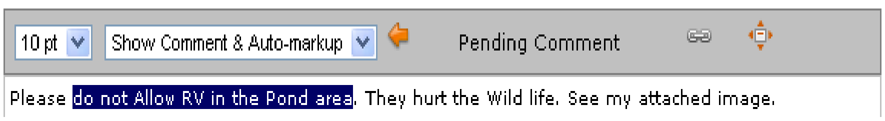


Click on the normal view icon to return to the regular letter coding page screen.

Coding a letter involves using the Right Panel on the Letter Coding page. The right panel consists of three sections namely Coding, Comment, and Auto-Markup. You may use the Tabs to move between the sections.



The Coding section of the Right Panel is where the user will select the codes they want to apply to a letter excerpt (i.e., comment). First a User must select the text that they want to designate as a comment.

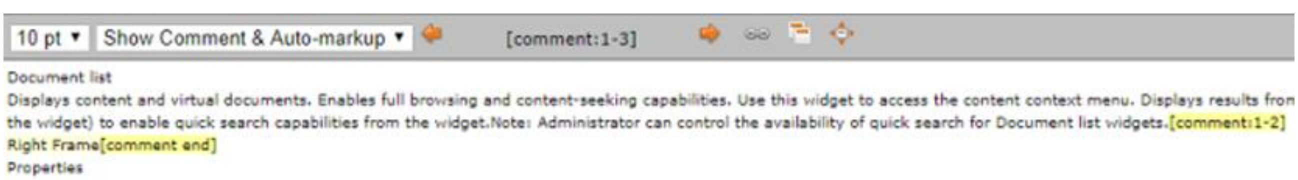


Then they can find the code that they want to apply to the comment.

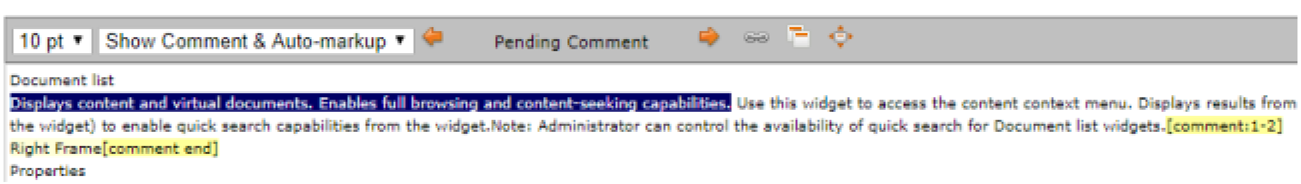
You may filter the list of codes by Clicking on the Advanced Search Advanced Search link.

You may Code up to 10 Codes per comment. Applying at least one Early Attention code to a comment within the letter will change the Letter's Early Attention Status to 'Coded'.
To begin the coding process you must first activate the textbox.

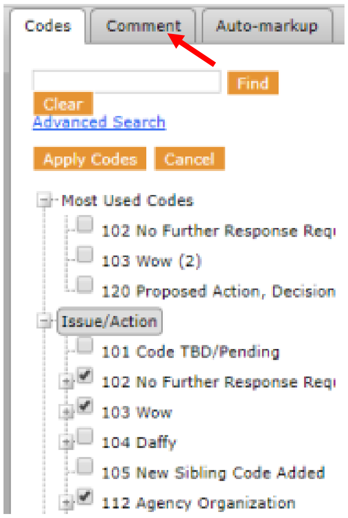
Step 1: Click on the letter text area. Once in the Letter coding textbox, you may move around to reach the desired comment location.

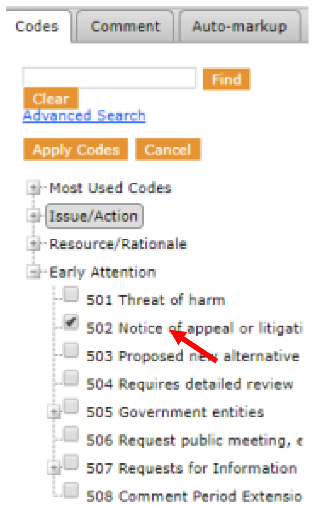


Step 2: Highlight the desired content you would like to code.

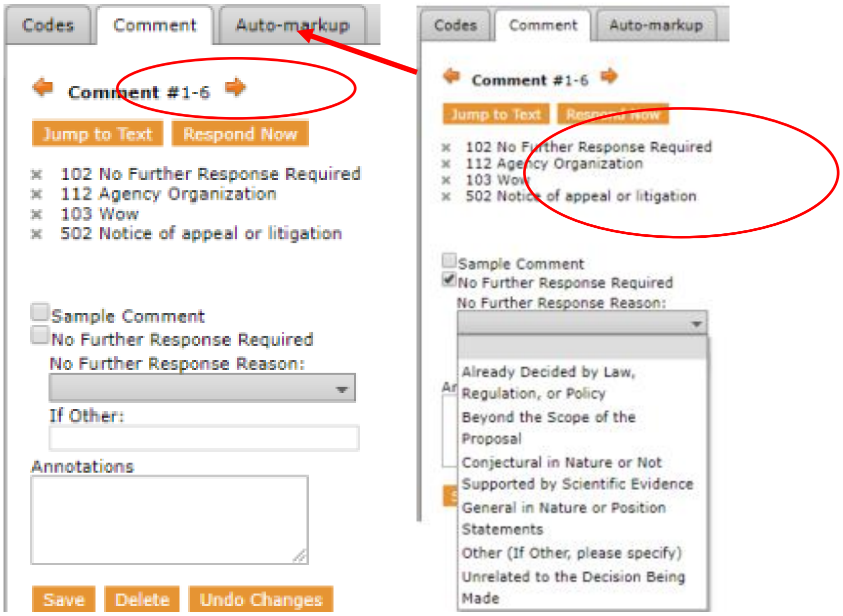


Step 3: Click the **Codes** Tab. Select Main areas such as Most Used Codes, Issue/Action, Resource/Rationale, and Early Attention by clicking the + sign next to the category. Select the codes desired by checking the necessary boxes those with a + can be expanded further. When finished click the **Apply Codes** button. The check marks will disappear.

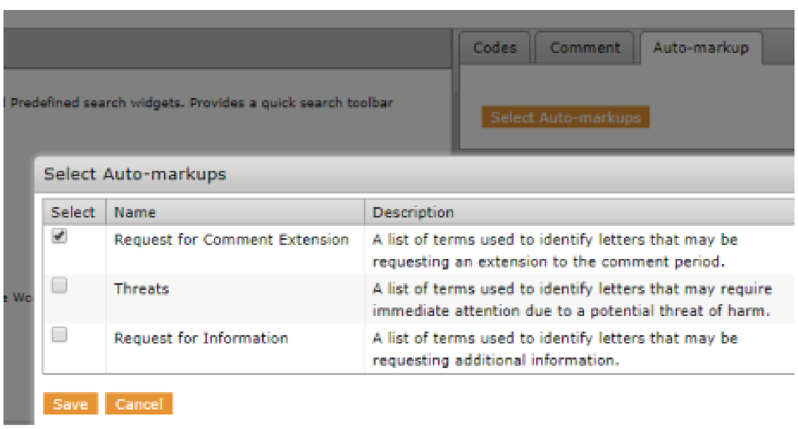




Step 4: The area you highlighted will now show up as green which means it is the current comment that you are actively working on. Click on the **Comment** tab. This where you can see the codes you selected for the comment. To move from comment to comment simply click the arrows next to the comment number. You may also mark the comment as not needing further response and selecting the reason why. You may also add special notes in the Annotations box. When finished click the **Save** button. When more comments are identified the green comment will turn yellow. If you want to review previous comments click on the highlighted area and it will turn green to activate.



Step 5: An optional area is where to select predetermined **Auto Markups**. If you selected these at the beginning of setting up your project. When you check the box any key words in the category selected will be highlighted in blue in the letter being coded. When completed click **Save**.



Select the "Save" button to capture the auto-markup validations provided.

- In the event that the term occurs more than once, you will only need to designate its applicability once.
- You may expand the List of Term category by clicking on the + icon to expand, and the – icon to collapse.
- When a user indicates that an Auto-markup term found applies, the term is displayed within the letter, the term is available on the Early Attention Standard Report for the Comment Period.
- Additionally, the Early Attention status will indicate that this letter 'Needs Review'.
- When a user indicates that an Auto-markup term found is Not Applicable, the term is removed from display within the letter; the term is not shown on the Early Attention Standard Report for the Comment Period. Additionally if all the Early Attention terms are determined to be N/A, the Early Attention status will display 'Not Required'.

- When all of the Auto-markup terms found within the letter are either Completed or declared Not Applicable, the Early Attention flag is lifted from the letter and as a result the Early Attention Letter count is decreased on the My Projects, Project homepage, and Comment Period homepage Letter count tables. Additionally the Early Attention status will display 'Completed'.
- Also, you may enter an annotation (comments) associated with each individual auto-markup term. Select the "Show" button next to Annotation and a text box will be displayed. Enter any text in the box or view annotations saved previously. Selecting the "Hide" button will close this annotations text box.

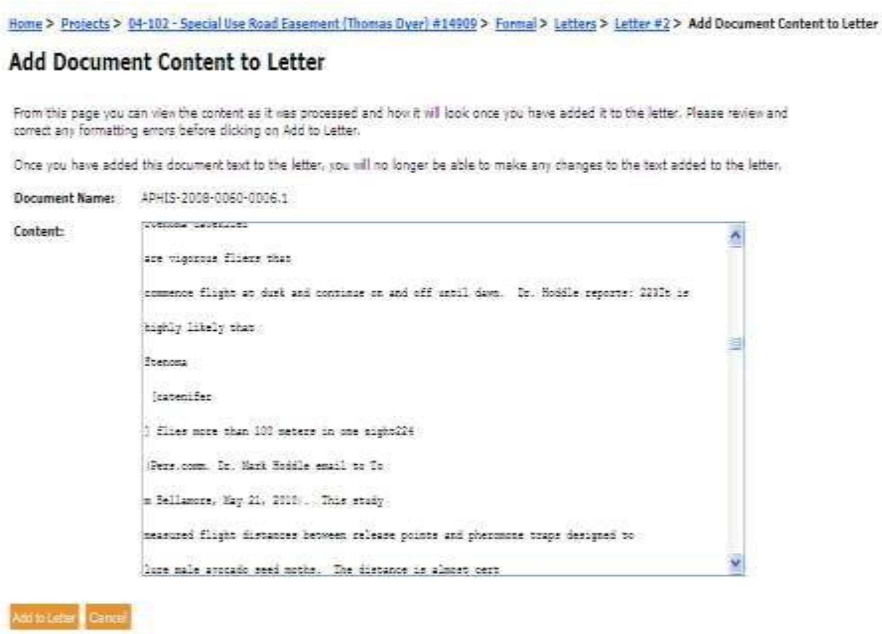
Click on Select Auto-Markups to activate other List of Terms not selected at Comment Period

.

Step 6: Any documents that were submitted with the letter upon ingress will be displayed on the Letting Coding page.

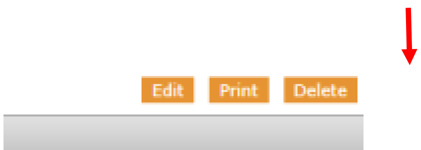
You may click on the File name to download a single file, or the Download All button to download all of the documents.

To use the Append functionality from the attached documents you may click on the Add Content to Letter button. From this page you will be able to see how the text will be displayed in the letter for coding, approve by clicking on the Add to Letter button and append the attachment text to the letter.



Delete a Letter

When the 'Delete' button is displayed, in the upper right hand corner of the Letter Coding area, you may delete the letter if desired by clicking the button. A confirmation message will appear to confirm you want to permanently delete the letter. It is strongly suggested you do not delete letters.

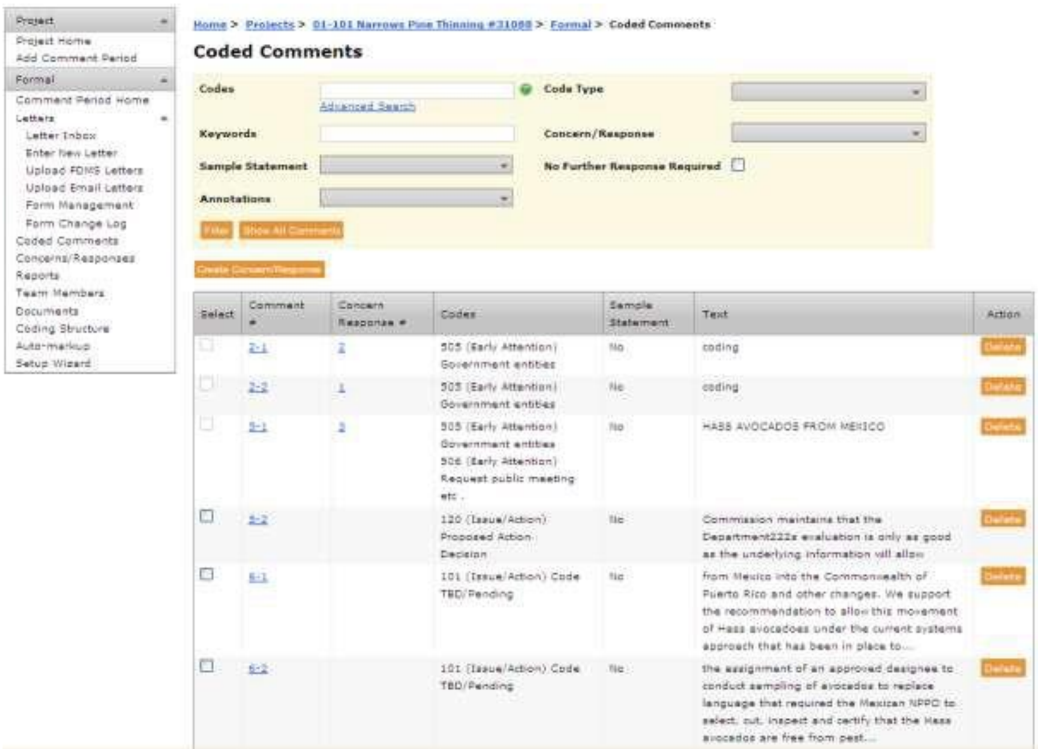


8.6 CARA Coding and Comments Management

CARA allows users to Code comments in letters which provide useful insight from the public. These comments are then listed on the CARA Coded Comments Page.

8.6.1 CARA Coded Comments Page

CARA allows Users to view the Coded Comments from the Coded Comments Page.



The checkbox next to the Comment IDs allows you to select comments to include in a Concern statement and Response.

If the check box cannot be selected, and a Concern Response # is listed next to the Comment ID, then that comment is already a part of a Concern Statement and Response and cannot be selected for inclusion in another Concern Statement and Response.

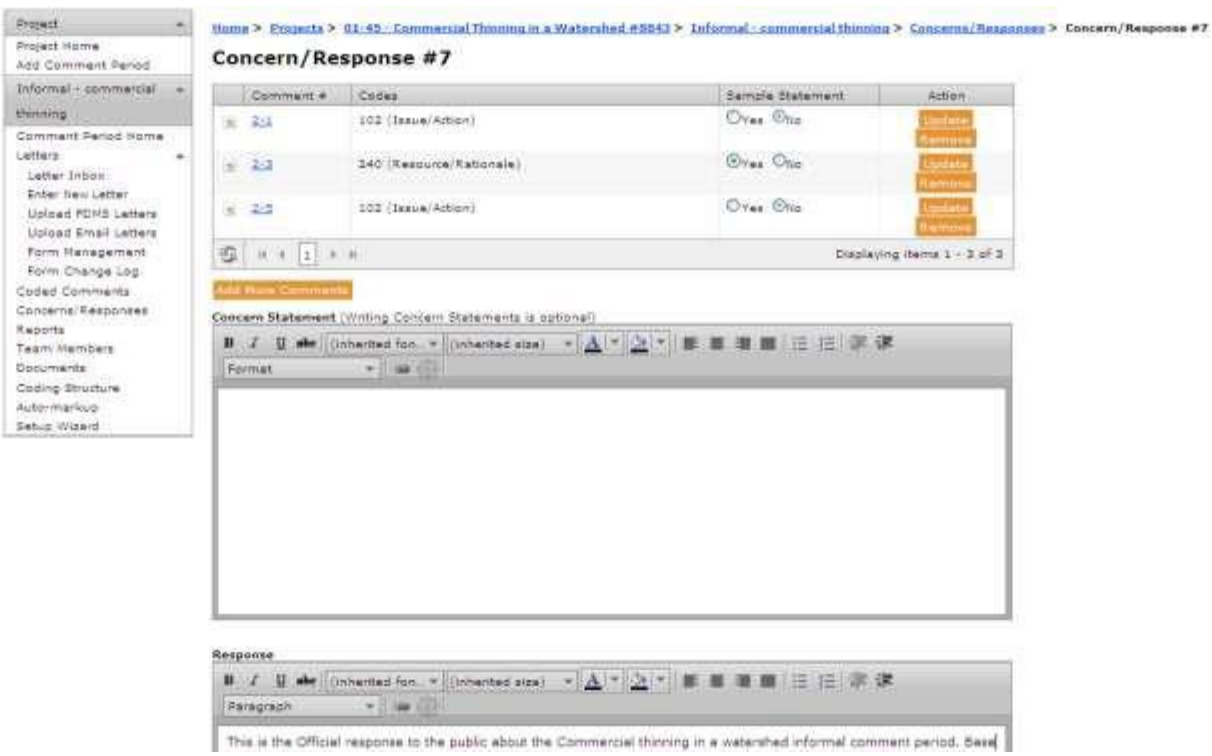
Comment IDs are unique to each Comment Periods.

8.7 CARA Concern and Response

CARA Concern and Response functionality allows Users to respond to the public comments.

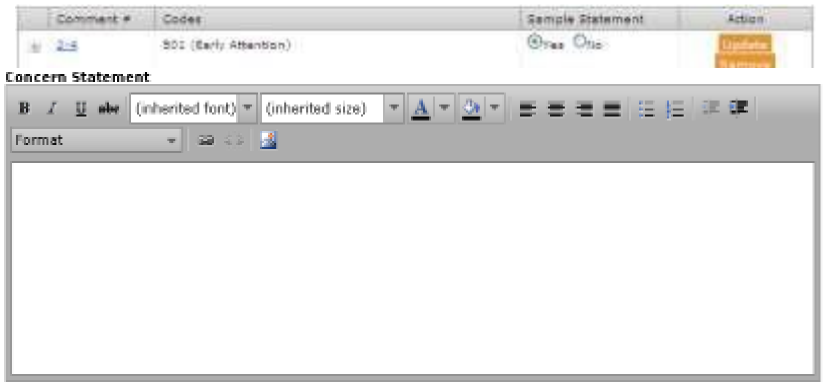
8.7.1 Concern and Response Creation Page

This page allows CARA users to include a Concern statements (optional) and Responses for one or more comments. This comes in very useful in creating the same response for all like issues in the outline.



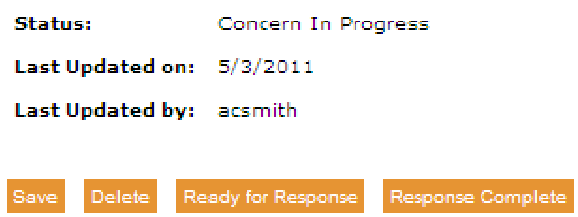
Step 1: First you must select comments to include in the Concern statement and Response. See the Selecting Comments to include in a Concern and Response section for more information on the various methods in which you can select the comments.

Once you have selected the comments to include in the Concern statement and Response, and are on the Concern and Response creation page, you may review the comments. If additional comments are needed k on Add More Comments to add additional comments.

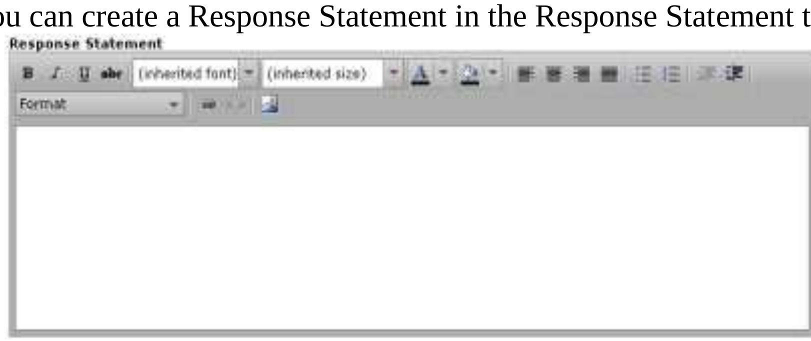


Step 2: Write the optional Concern Statement in the Concern Statement text box. This is an optional step.

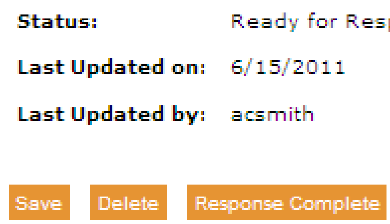
This will change the status of your Concern statement and Response to Concern in Progress. Once you are Finished with the Concern Statement, click on the Ready for Response button. This will change your Concern statement and Response status to Ready for Response.



Step 3: Next you can create a Response Statement in the Response Statement text box.



This will change the status of your Concern statement and Response to Response in Progress. Once you are Finished with the Response, you can click on the Response Complete button. This will change the status of your Concern statement and Response to Response Complete.

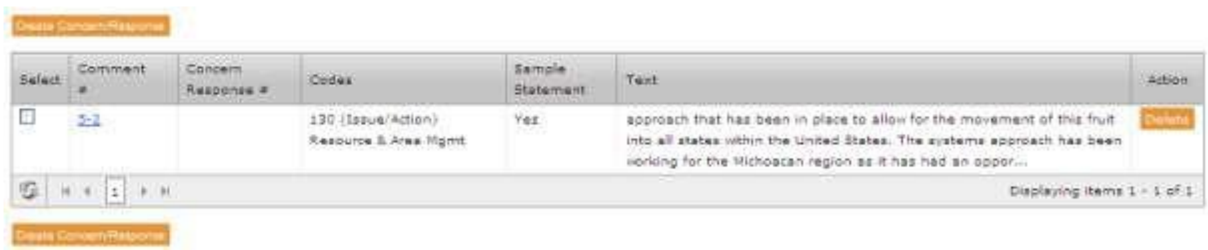


Click on the Save button to save your progress anytime. Click on the Delete button to delete this Concern statement and Response

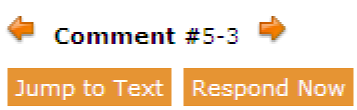
8.7.2 Selecting Comments to include in a Concern and Response

You may Select Comments to include in a Concern statement and Response from the following four methods:

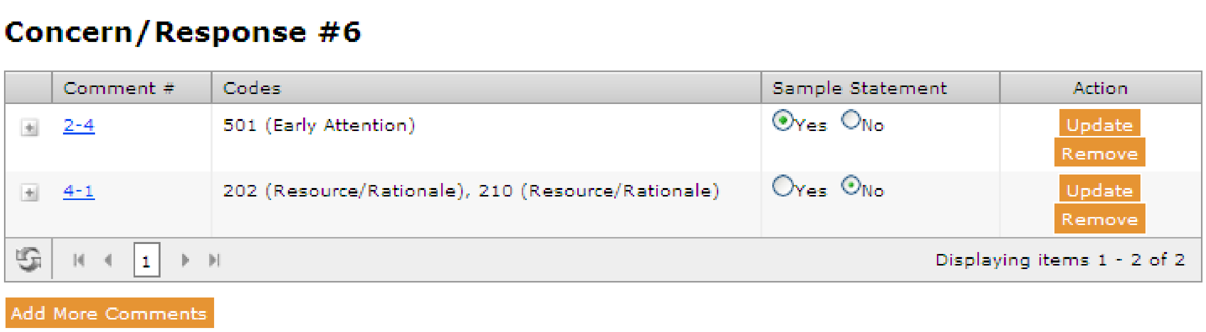
1. Coded Comments Page



2. Directly from the Letter Coding Page

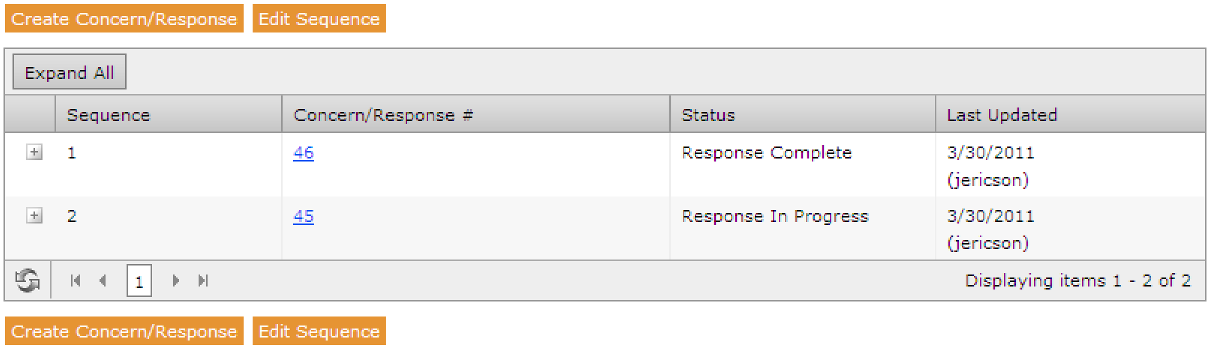


3. From within a Concern and Response Creation Page from the Add More



Comments Button.

4. From the Concern and Response Listing page



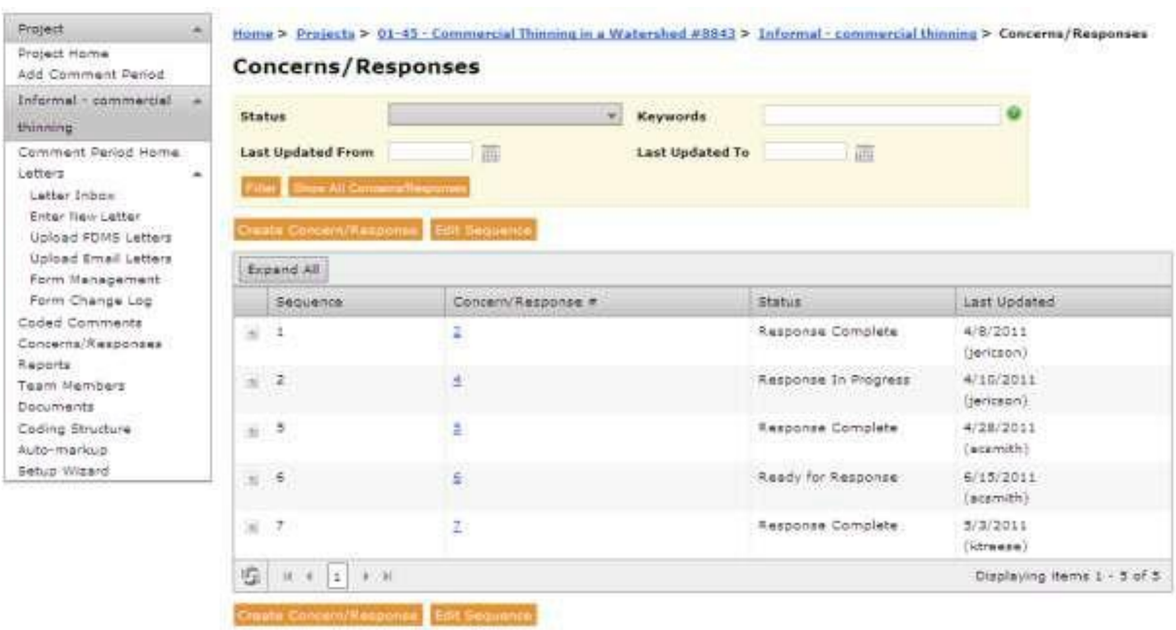
8.7.3 Status of Concern statements and Responses

CARA organizes the Concern statements and Responses into the following status types:

1. Concern in Progress
2. Ready for Response
3. Response Complete
4. Response in Progress

8.7.4 Concern and Response Listing page

CARA allows Users to view the Concern statements and Responses that were generated in response to the public comments.

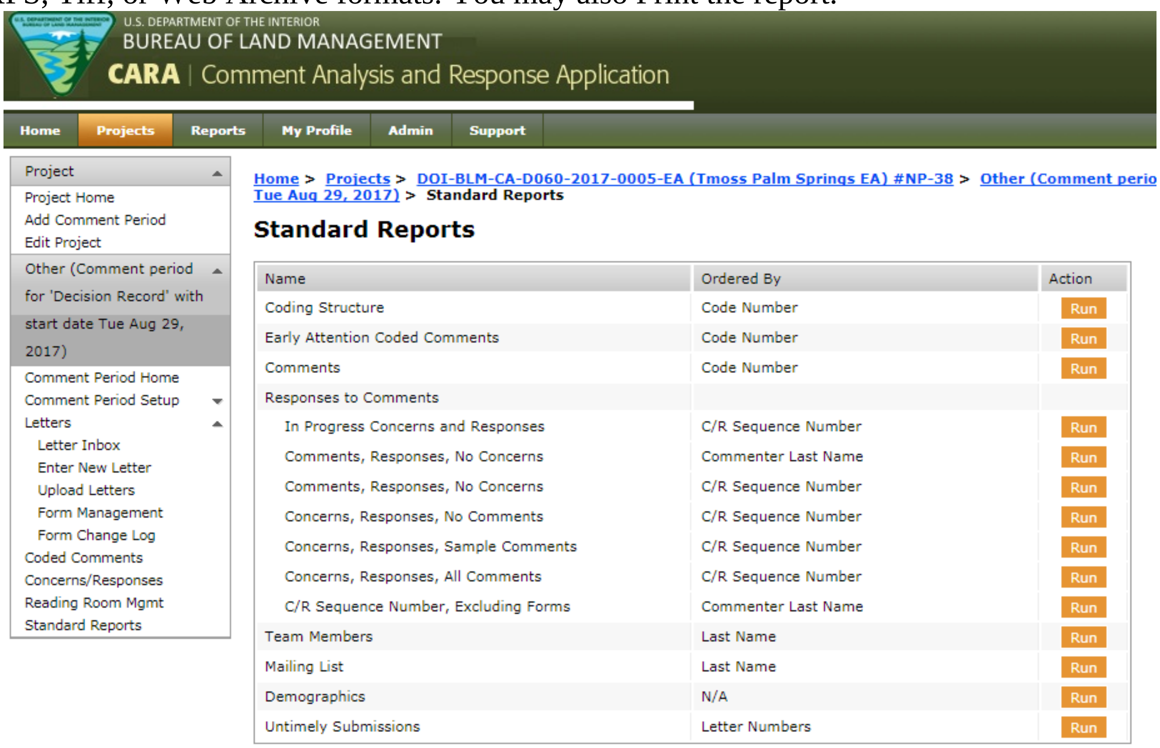


8.8 CARA Reports

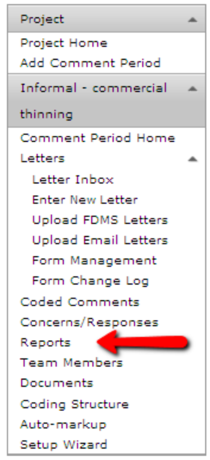
CARA allows users to generate reports to display useful information in a specified manner. There are 10 Standards reports available within each CARA Comment Period, as well as the option to generate Custom reports across CARA Projects and CARA Comment Periods.

8.8.1 CARA Standard Reports

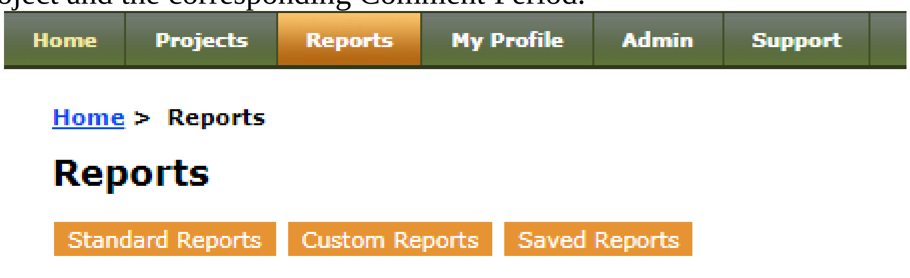
The CARA Standard Reports section provides the user with predefined reports that can be run with one click. The users then have the option to export them to the .PDF, .CSV, .XLS, .RTF, .XPS, Tiff, or Web Archive formats. You may also Print the report.



Step 1: From the Comment Periods left navigation click on the link for Reports



You may also access a Comment Periods Standard Reports from the Reports tab by selecting a CARA Project and the corresponding Comment Period.



Step 2: Click on the Standard Report you wish to run by clicking on the Run button for the corresponding report.

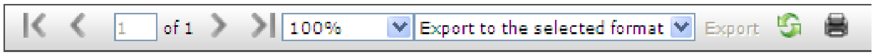

Home > Projects > Quisque at metus quis #10010 > Formal > Reports

Reports

Name	Action
Coding Structure	Run
Comment	Run
Demographic	Run
Early Action	Run
Mailing List	Run
Organization Type	Run
Response Status	Run
Response to Comment (Horizontal View)	
Responses & Concerns	Run
Responses, Concerns, and all Comments	Run
Responses, Concerns, and Sample Comments	Run
Response to Comment (Vertical View)	
Responses & Concerns	Run
Responses, Concerns, and all Comments	Run
Responses, Concerns, and Sample Comments	Run
Team Member	Run
Untimely Comments	Run

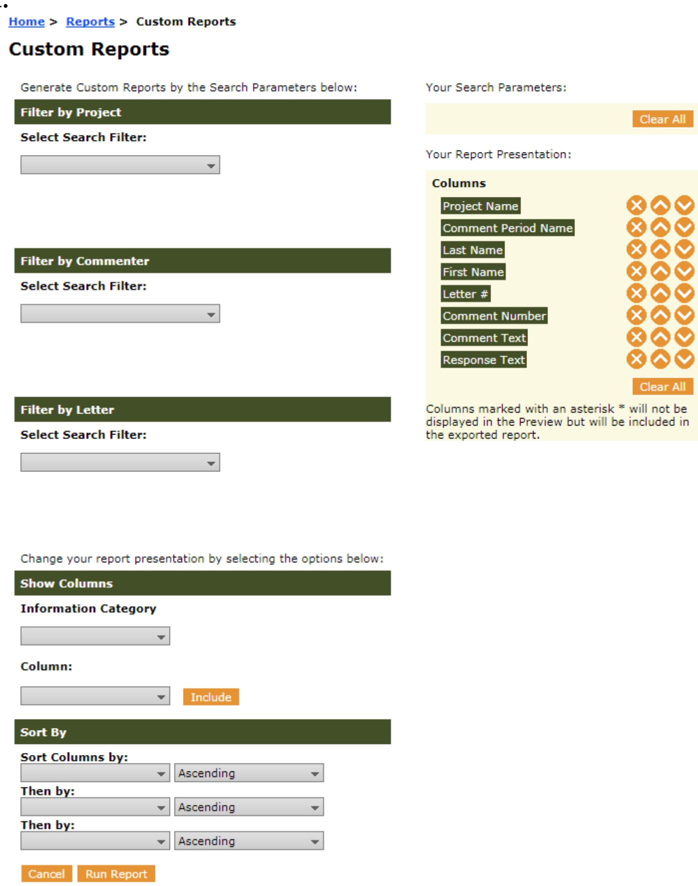
If the Comment Period has been Archived, the Run button will not be displayed for some of the reports. Instead, the View Archived Report button will be displayed.

Step 3: After viewing the report you have the option to export them to the .PDF, .CSV, .XLS, .RTF, .XPS, Tiff, or Web Archive formats. You may also Print the report.

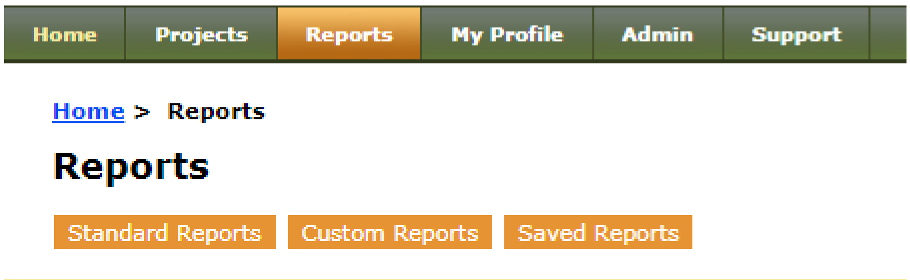


8.8.2 CARA Custom Reports

The CARA Custom Reports section allows users to generate Custom Reports based on user selected criterion. The users then have the option to Save the reports to the My Reports section, or export them to the .PDF, .CSV, .XLS, .RTF, .XPS, Tiff, or Web Archive formats. You may also Print the report.



Step 1: From the Global Navigation click on the Reports Tab, and click on the Custom Reports button.

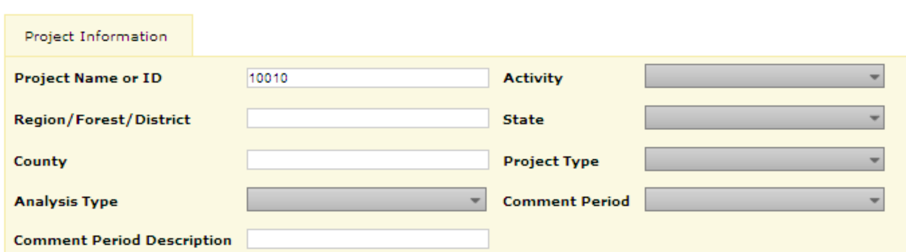


Step 2: Select the criterion you wish to return. Options include:

Submitter: Last Name, First Name, City, State, Zip/Postal Code From/To, Country, Organization, Organization Type, and Official Representative

Letter / Comment: Delivery Type, Submitted Date From/To, Letter Number, Letter Text, Comment Code, Concern Text, Response Text

Project Information: Project Name or ID, Activity, Region/Forest/District, State, Country, Project Type, Analysis Type, Comment Period, Comment Period Description



At least one criterion must be input by the user amongst any of the Project Information, Letter/Comment, and Submitter options.

Step 3: Select the option to Include data from Submitter, Letter/Comment, and Project

Information

Select the view(s): ☑ Submitter ☑ Letter/Comment ☑ Project Information

Selecting a view will display those fields when the Custom Report is generated.

Step 4: Click on Run button to run the report.

You may press Clear button to clear all criterion and start over.

Include data from: ☐ Submitter ☐ Letter/Comment ☑ Project

Run Clear

Step 5: Review the report to ensure you want to proceed.

In the event that you wish to make changes to the report click on Modify Search button.
Step 6: If the report is satisfactory you may click on Show in Report Viewer button to create the Printable and Exportable version of the report.

U.S. DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT
CARA | Comment Analysis and Response Application

Coding Structure Report

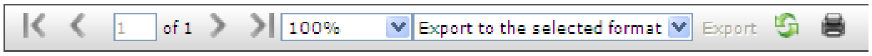
Project: DOI-BLM-CA-D060-2017-0005-EA (Tmoss Palm Springs EA) (NP-38)

Comment Period: Other - Comment period for 'Decision Record' with start date Tue Aug 29, 2017

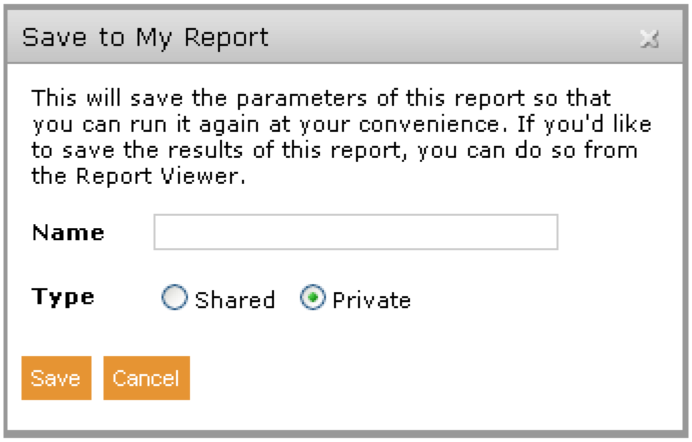
Period Dates: 8/29/2017 - 8/31/2018 **Generated:** 8/30/2017 11:25 AM

Code #	Code Name	Comment Count
Total Comments		**3**
Issue/Action		
101	Code TBD/Pending	0
102	No Further Response Required	0
102.01	Beyond Scope	0
102.02	Position, No Rationale	0
102.03	Already Addressed	0
110	Decision Process	0
110.01	Roles, Authorities	0

From the Report viewer you will have the option to export the report to the .PDF, .CSV, .XLS, .RTF, .XPS, Tiff, or Web Archive formats. You may also Print the report.

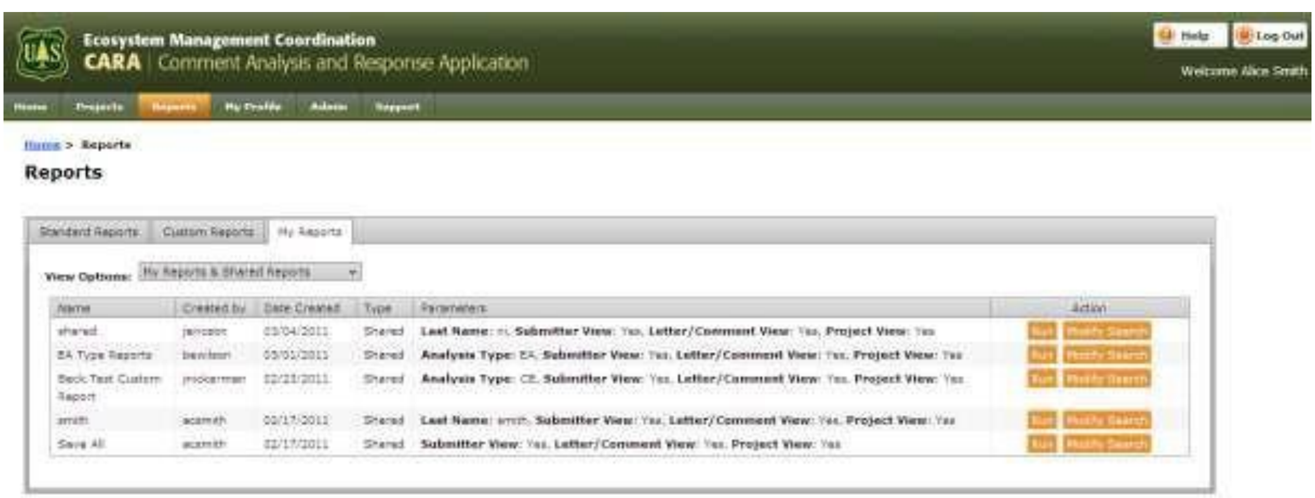


Step 7: You may also click on Save to My Reports button to save the selected report criterion for later use in the My Reports table. Once Save to My Reports is clicked you will have the option to provide a short title for the report, as well as designate the Report as Private (Available only to the user), or Shared (Available to all CARA users).

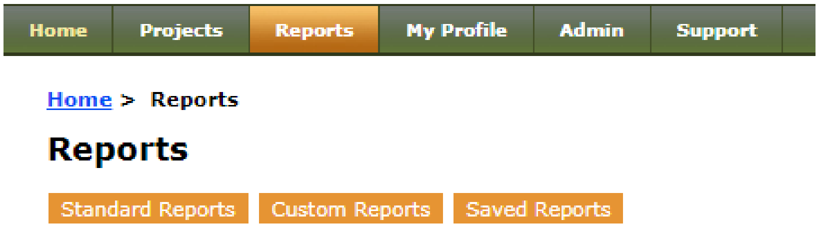


8.9 CARA My Reports

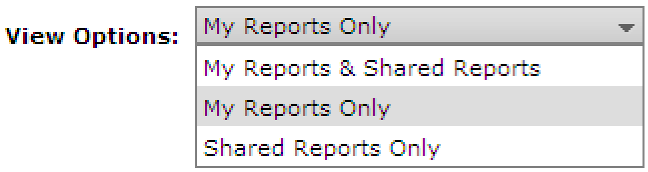
The CARA My Reports section allows users to retrieve the reports generated by users which were saved as either shared or private reports. This section is not for the creation of reports, rather a display of the saved reports.



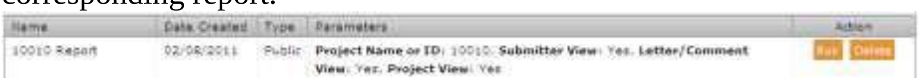
Step 1: From the Global Navigation click on the Reports Tab, and click on the Custom Reports Tab



Step 2: You may view and run the report parameters for Shared reports from the drop down. These reports are created and shared by other CARA users.



Step 3: Click on the Saved Report you wish to run by clicking on the Run button for the corresponding report.



Once a report has been run you will have the option to Modify its Search criterion, Show in Report Viewer as well as Save the Report to My Reports as a new saved Report.

You may also Delete a report saved to the My Reports section by clicking on the Delete button. You will be prompted to confirm, click OK to confirm the deletion

Chapter 9. CARA Stand Alone

(Special Permissions Necessary for This Section)

9.1 Introduction

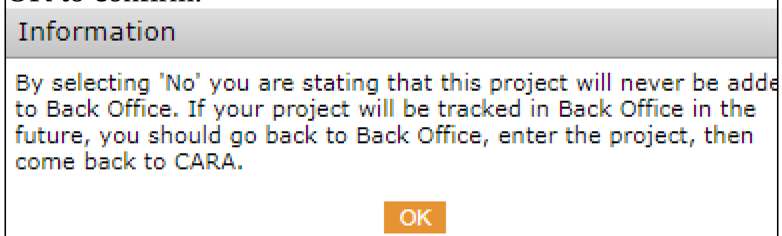
This chapter is designed for projects that do not need ePlanning projects attached to them. Only limited personnel with special clearance from the ePlanning User Representative will have access to create projects outside of ePlanning using this method. This set up should not be used if you have an ePlanning project attached to the NEPA Register as it will not allow Front Office submissions to enter CARA.

9.2 Creating a New Project in CARA

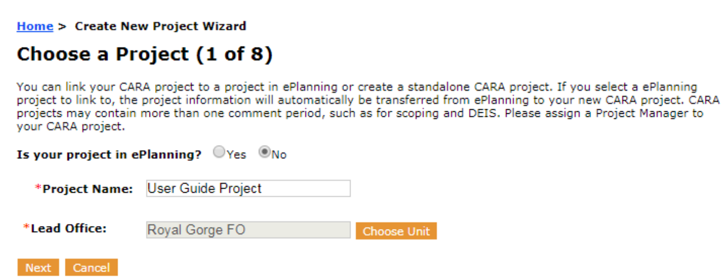
Function	This section allows the users to create a CARA Project that is not and never will be present in the rest of ePlanning, as well as assign a CARA Project manager to the project. • This functionality is only available to the Super Users, and Coordinators • This step does not apply to the Add Comment Period wizard • This step does not apply to the Modify Comment Period wizard
Work flow	Step 1: From the homepage, click on the New Project button  This button is only available from the CARA homepage

Step 2: Click on No to distinguish this as a Project that is not and never will be in the rest of ePlanning.

A notification will tell you that adding a project in this manner will preclude any future link to Back Office. Click OK to confirm.

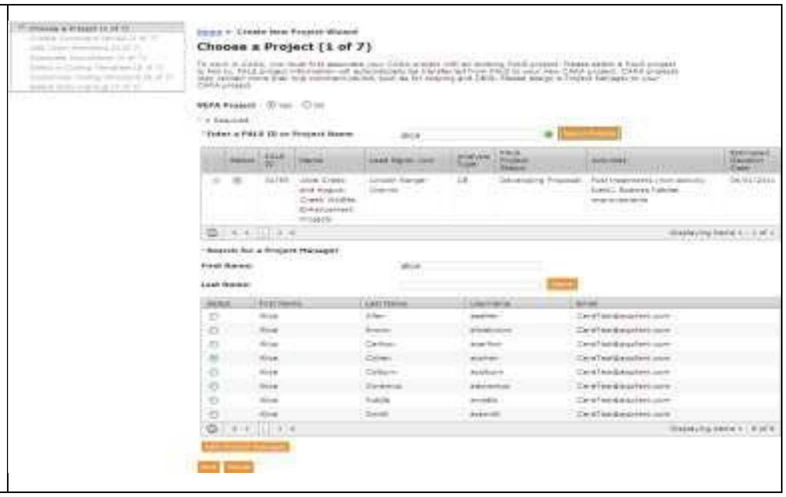


Step 3: Enter a Project Name and click the Choose Unit button to select a lead office from the resulting BLM office structure.



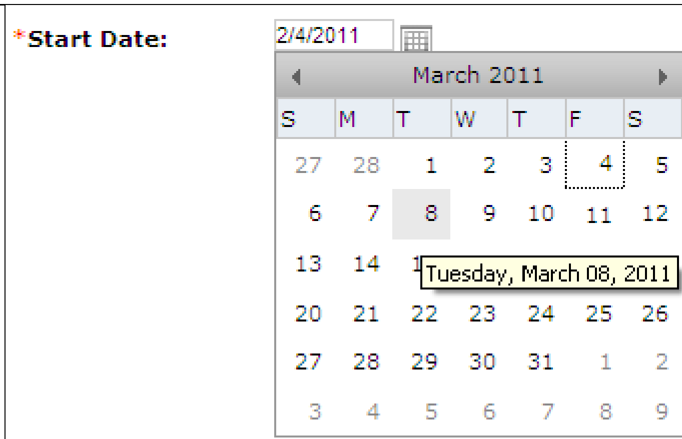
Step 4: Click on the Next button to go to the next step
You can click on Cancel button to cancel any changes and go back to the CARA homepage.

Authorized Roles	Super Users, Coordinators

Image	

9.2.1 Create a Comment Period

Function	Allows the users to create a new Comment Period within a CARA Project This functionality is only available to the Super Users, Coordinators, and Project Managers This step applies to the Add Comment Period wizard This step does not apply to the Modify Comment Period wizard
Work flow	Step 1: Provide a brief description for the Comment Period you are creating  Step 2: Click on the Calendar icon to use the pop out calendar to select the date when this Comment Period will become active

<table>
<tr><td></td><td>


You may also type in the date in the text field with correct formatting

Step 3: You can modify the Duration of the comment period by changing the number of days.

You may make the Comment Period last longer

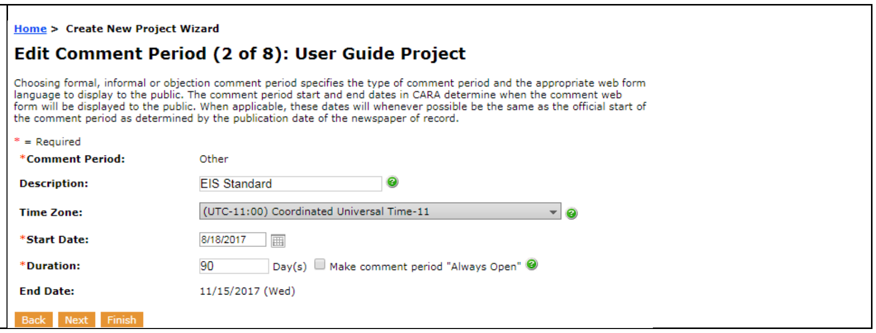
There is no minimum duration for informal Comment Periods

You may not decrease the minimum number of days required for the comment period. Different Comment Periods may have different requirements. For more information, review the “Business rules for project creation” document located in the Support section of CARA.

Step 5: Click on the Next button to go to the next step

Super Users, and Coordinators can click on Back to go back one step.

Users can click on Finish button at this time to go to the Project Acceptance page. Default values will be used for all skipped steps. For the default values please visit the Project Acceptance page below, or click here.
</td></tr>
<tr><td>Authorized Roles</td><td>Super Users, Coordinators, Project Managers</td></tr>
</table>

Image	

9.2.2 Add Team Members

Function	This section allows the Super Users, Coordinators, and Project Managers to assign a Comment Period Manager and Team Members to this CARA Project's Comment Period. Both the Comment Period Manager and Project Managers can assign Team members to this project. Project Managers serve as the default Comment Period Managers in the absence of a specified user as the Comment Period Manager.

	This functionality is only available to the Super Users, Coordinators, Project Managers, and Comment Period Managers This step applies to the Add Comment Period wizard This step applies to the Modify Comment Period wizard

Work flow

Step 1: Add Team Members: You are set as the default Comment Period Manager by default.

Role	First Name	Last Name	Username	Email	Status	Action	
Comment Period Manager	Yahya	Zia	yzia	yahya.zia@aquilent.com	Active	Deactivate	Remove

You can add another Comment Period Manager or a Team Member by clicking on the Add Team from directory radio button.

I want to: ○Add Member from Directory

You can search for a user by their last name or their first name.

First Name:

Last Name: Ringenberg Search Users

Click on the radio button under Select to the user to add to the Comment Period team.
Click on Add User to add the user to the team roster.

Select	First Name	Last Name	Username	Email
◉	Erik	Ringenberg	eringenberg	jeffrey.rhoadhouse@aquilent.com

1

Add User

Step 2: Reuse Team Members: To reuse members click on the radio button labeled Reuse Team Members

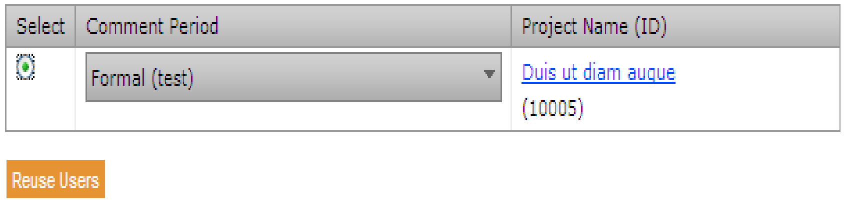
I want to: ○Add Member from Directory ◉Reuse Team Members

Search for a Project to Reuse team members from by the projects name or ID

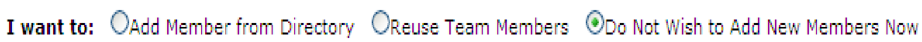
Search Projects by ID or Name 10005 Search Projects

Partial search is supported for project name search. Minimum of 4 letters are required.

Select the comment period you wish to import the users from and click on the Reuse Members button to import the users associated with that Comment period.



Step 3: Do Not Add any more Team Members: If you do not wish to add any more members at this time you may click on the Do Not Wish to Add New Members Now radio button



Step 4: Deactivation and Removal of Team Members: You may Remove a Team Member as long as they have done no work (e.g. Code letters) within the Comment Period. If you cannot remove a Team Member, you still have the option to Deactivate them.

To Remove or Deactivate a member click on the button for either Remove or Deactivate.

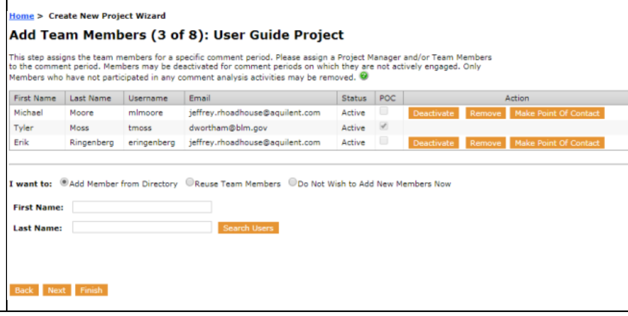
Once you click on either the Deactivate or Remove buttons, you will be prompted to confirm your action. Click on OK to proceed.

If you Deactivate a User you may Reactivate them by clicking on the Activate button.

Step 5: Click on the Next button to go to the next step

Super Users, Coordinators, Project Managers, Comment Period Managers can click on Back to go back one step.

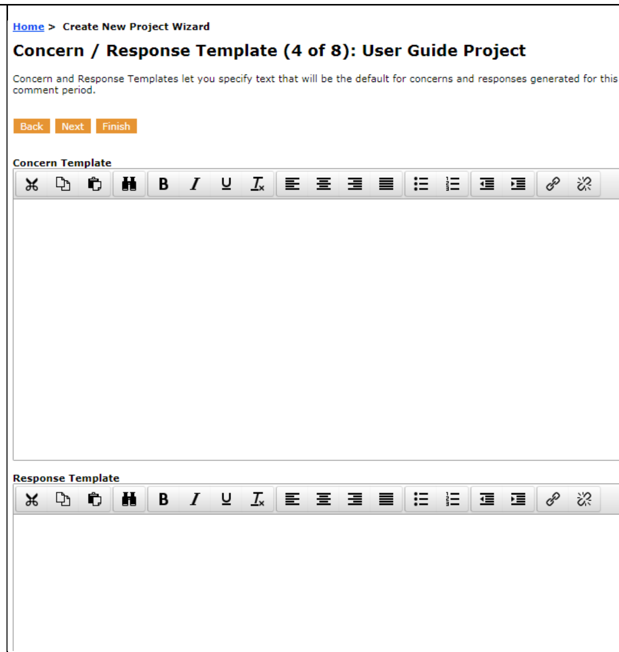
Users can click on Finish button at this time to go to the Project Acceptance page. Default values will be used for all skipped steps. For the default values please visit the Project Acceptance page below, or click here.

<table>
<tr><td>Authorized Roles</td><td>Super Users, Coordinators, Project Managers, Comment Period Managers</td></tr>
<tr><td>Image</td><td>
</td></tr>
</table>

9.2.3 Concern/Response Template

Function	This section allows the Super Users, Coordinators, Project Managers, and Comment Period Managers to specify text that will act as the default for any concerns and responses generated for this comment period. This step applies to the Add Comment Period wizard This step applies to the Modify Comment Period wizard

Work flow	Step 1: Enter the text that you would like to be the default for any Concerns and Responses associated with this comment period. These can then be modified on a case by case basis as needed during the comment coding process. Once completed, click the Next button to proceed.
Authorized Roles	Super Users, Coordinators, Project Managers, Comment Period Managers

Image	

9.2.4 Select a Coding Template

Function	This section allows the Super Users, Coordinators, Project Managers, and Comment Period Managers to select a Coding Template for this Project. You may either select a coding template, or reuse one from a prior CARA Project's Comment Period. This step applies to the Add Comment Period wizard This step does not apply to the Modify Comment Period wizard

Work flow	Step 1: Select a Coding Template: You can opt to select a coding template by clicking to select the radio button labeled Select Coding Template From System **I want to:** ○Select Coding Template From System ○Reuse Coding Structure

<table>
<tr>
<td></td>
<td>appear, select the desired Comment Period from the drop down and select the radio button for the correct project under the column Select.

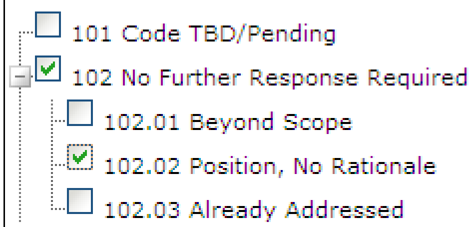
Step 3: Click on the Next button to go to the next step
Super Users, Coordinators, Project Managers, Comment Period Managers can click on Back to go back one step.
Users can click on Finish button at this time to go to the Project Acceptance page. Default values will be used for all skipped steps. For the default values please visit the Project Acceptance page below, or click here.</td>
</tr>
<tr>
<td>Authorized Roles</td>
<td>Super Users, Coordinators, Project Managers, Comment Period Managers</td>
</tr>
<tr>
<td>Image</td>
<td>
</td>
</tr>
</table>

9.2.5 Customize Coding Structure

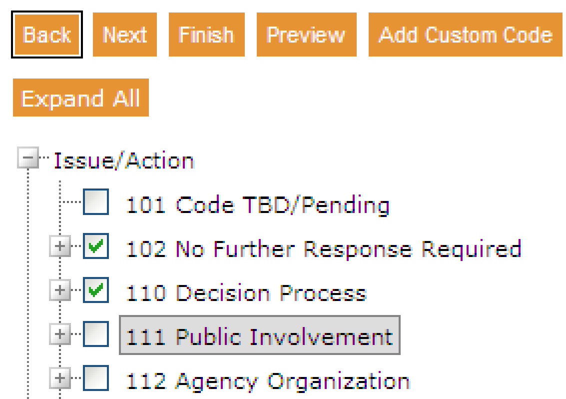
<table>
<tr>
<td>Function</td>
<td>This section allows the Super Users, Coordinators, Project Managers, and Comment Period Managers to Customize the coding structure to be used for this Comment Period. This section allows the creation of Custom Codes which can be used in the event that a desired code is not available as part of the coding templates.
This step applies to the Add Comment Period wizard
This applies to the Modify Comment Period wizard
You may select or deselect existing codes
You may create or edit custom codes</td>
</tr>
</table>

Work flow

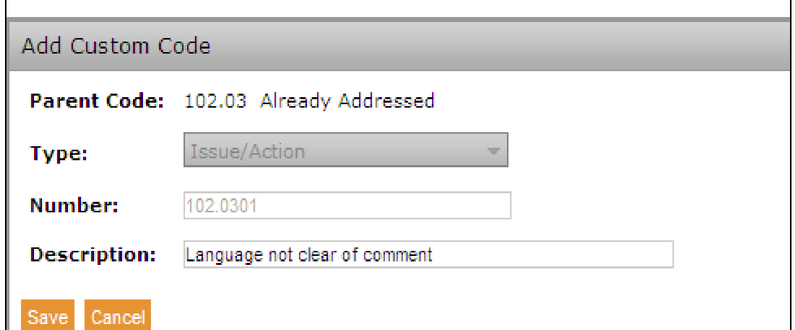
Step 1: Modify the Coding Structure: You can add or remove codes from your Coding Structure by selecting or deselecting its corresponding check box. You may expand or collapse the Coding Structure.



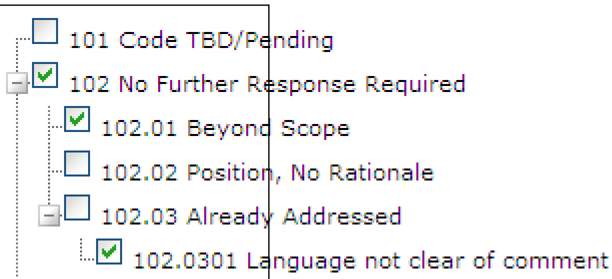
Step 2: Create Custom Code: You can create a Custom Code under or at the same level at code levels 2-4. To create a Custom Code under a code (Child level) click on the name of the Code and click on the button Add Custom Code.



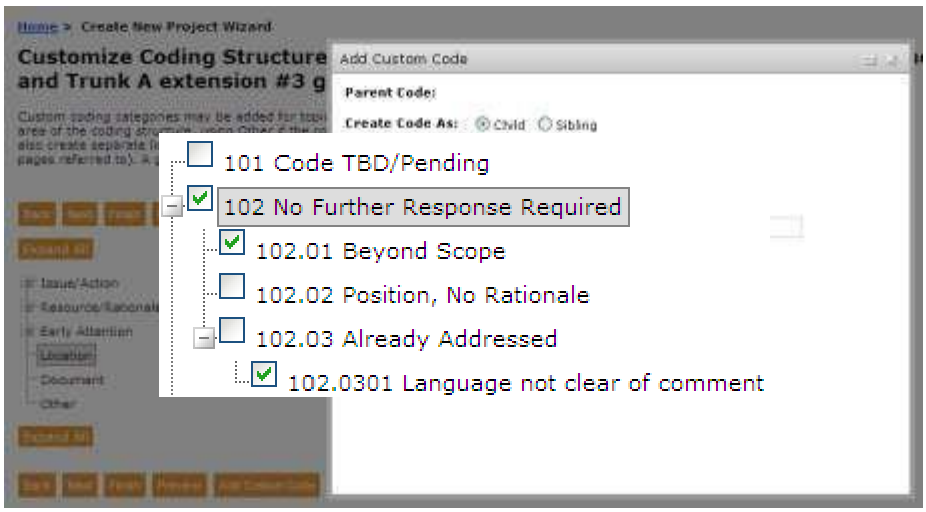
In the dialogue box that opens you may enter a description of the Code you are trying to create, followed by pressing Save.



Verify that the Code is in the correct location.

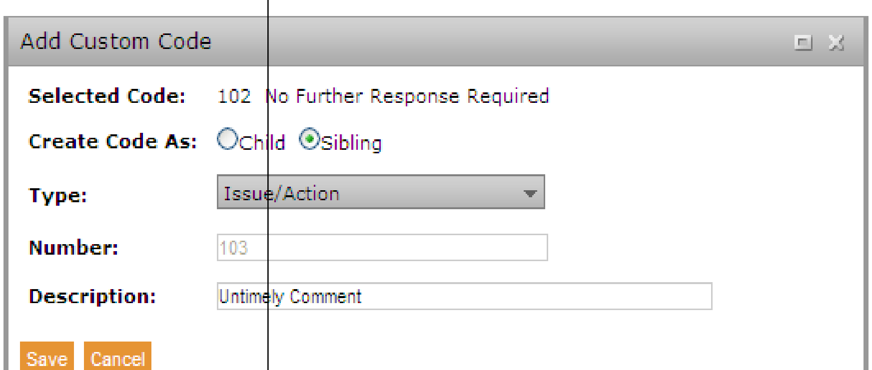


You may child create codes for the Location, Documentation, or the Other category by selecting the category and clicking on the Add Custom Code button.



You may also create a Code at the same level (Sibling level) of a code. You can click on the name of the code from which you want to create a same level code and click on the Add Custom Code button.

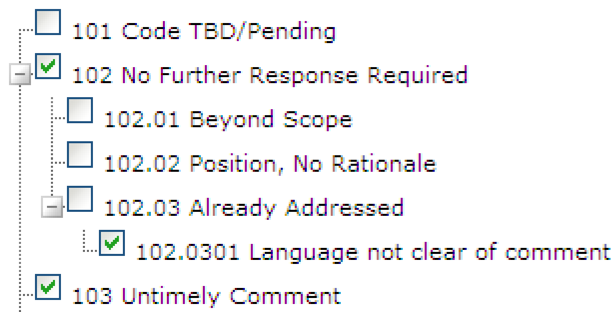
In the dialogue box that opens, click on Sibling to create a Code at the same level. Provide a description of the Code, followed by Pressing Save.



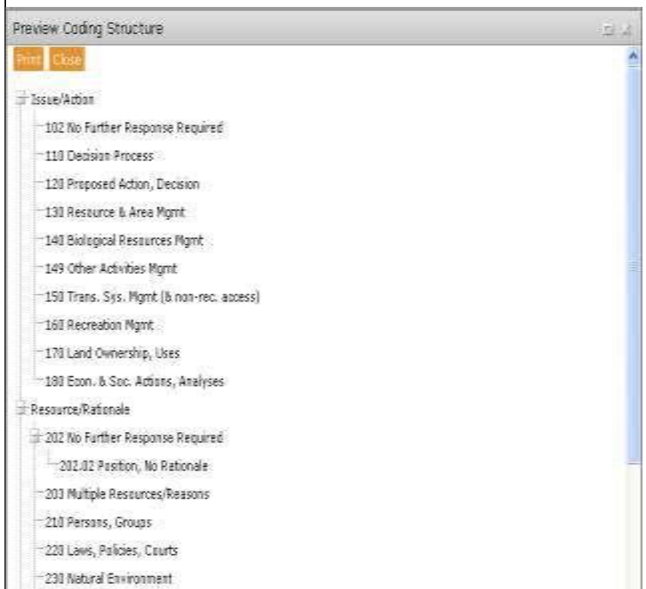
In the event that you wish to create a Code for the Location, Other or Documentation Category you may select those categories from the “Type” drop down.

In the event that you wish to create a custom code using only the keyboard keys, you may do so using the following keys:
Step 1: Ctrl-Shift-A: Activate the keyboard access on code selection.
Step 2: Ctrl-Shift-L: Go to the next, Lower visible code in the tree view.
Ctrl-Shift-U: Go to the previous, higher Up visible code in the tree view.
Step 3: Ctrl-Shift-S: Selects the code where you wish to create a new custom code and begins the process of adding the new custom code.
Ctrl-Shift-E: Opens the Edit custom code window (if the Edit Custom Code" button is available). This is available once a custom code has been created.
Step 4: Provide the description of the code, and press Save or Cancel.
Note: ESC key: Will cancel the process of selecting a code where you want to insert a custom code.

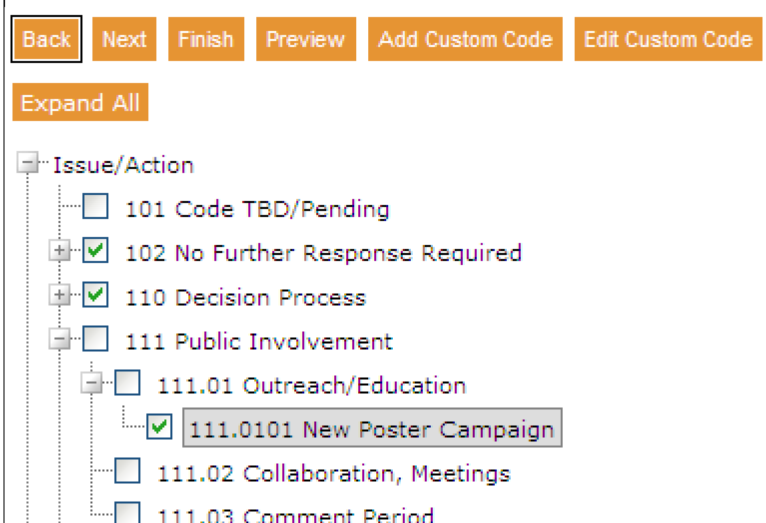
Verify that the code has been properly created and is checked.



You may view the Comment Periods selected codes by clicking on the button Preview button Preview



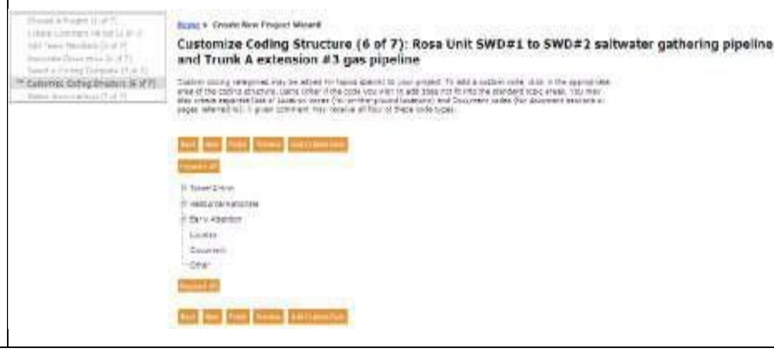
You may modify a user created custom code by clicking on the button Edit Custom code Edit Custom Code



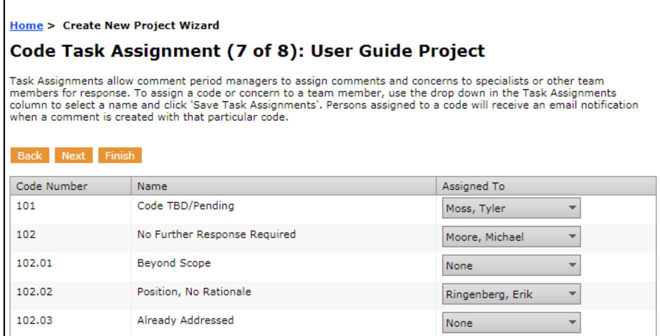
Step 3: Click on the Next button to go to the next step

Super Users, Coordinators, Project Managers, Comment Period Managers can click on Back to go back one step.

Users can click on Finish button at this time to go to the Project Acceptance page. Default values will be used for all skipped

<table>
<tr><td></td><td>steps. For the default values please visit the Project Acceptance page below, or click here.</td></tr>
<tr><td>Authorized Roles</td><td>Super Users, Coordinators, Project Managers, Comment Period Managers</td></tr>
<tr><td>Image</td><td>
</td></tr>
</table>

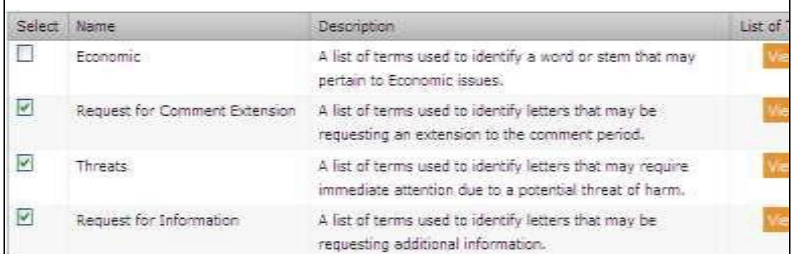
9.2.6 Code Task Assignment

<table>
<tr><td>Function</td><td>Task Assignments allow comment period managers to assign comments and concerns to specialists or other team members for response.
This step applies to the Add Comment Period wizard
This applies to the Modify Comment Period wizard</td></tr>
<tr><td>Work flow</td><td>Step 1: Use the drop down in the Task Assignments column to select a name for the desired codes and click 'Next'.


Persons assigned to a code will receive an email notification when a comment is created with that particular code.</td></tr>
</table>

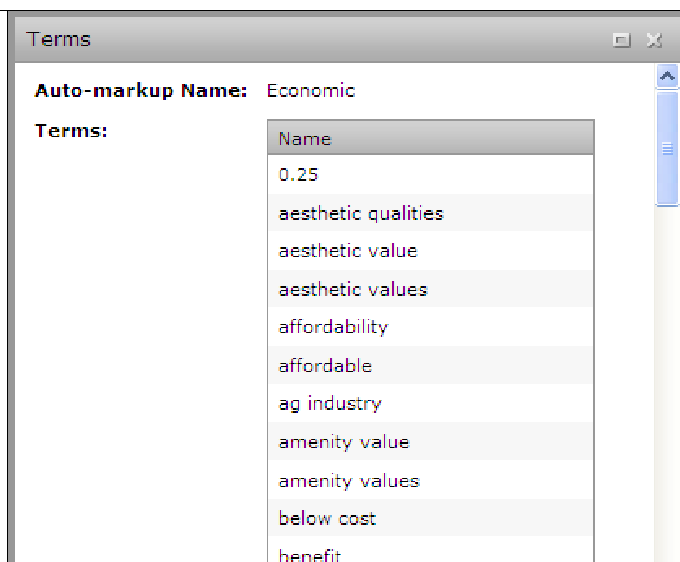
9.2.7 Select Auto-Markup

<table>
<tr><td>Element</td><td>Select Auto-Markup</td></tr>
<tr><td>Function</td><td>This section allows the Super Users, Coordinators, Project Managers, and Comment Period Managers to select the Auto-Markup list of terms which will be used for all letters that are submitted. Auto-Markup list of terms identify certain keywords contained within letters on the letter coding page to quickly and easily identify potential comments that may require early attention.
This step applies to the Add Comment Period wizard This applies to the Modify Comment Period wizard</td></tr>
<tr><td>Work flow</td><td>Step 1: You can add or remove Auto-Markup list of terms for your Comment Period by selecting ☑ or deselecting ☐ its corresponding check box.



Select	Name	Description	List of T
☐	Economic	A list of terms used to identify a word or stem that may pertain to Economic issues.	Vie
☑	Request for Comment Extension	A list of terms used to identify letters that may be requesting an extension to the comment period.	Vie
☑	Threats	A list of terms used to identify letters that may require immediate attention due to a potential threat of harm.	Vie
☑	Request for Information	A list of terms used to identify letters that may be requesting additional information.	Vie

You may view the terms contained within each Auto-Markup list of terms category by clicking on the View button.</td></tr>
<tr><td></td><td>



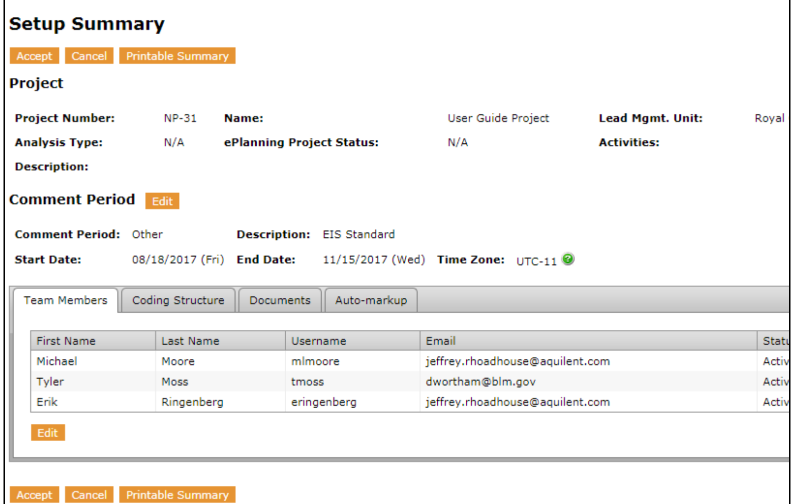
</td></tr>
</table>

	Step 2: Users can click on Finish button at this time to go to the Project Acceptance page. Super Users, Coordinators, Project Managers, Comment Period Managers can click on Back to go back one step.
Authorized Roles	Super Users, Coordinators, Project Managers, Comment Period Managers
Image	

9.2.7 Project Acceptance Page

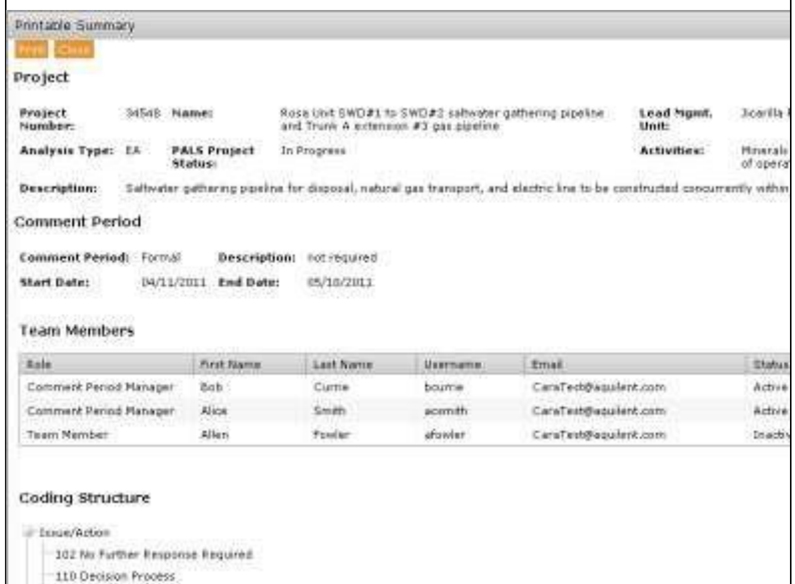
Function	This section allows the Super Users, Coordinators, Project Managers, and Comment Period Managers to verify the CARA Project's Comment Period details and make any changes prior to its creation. This step applies to the Add Comment Period wizard

	This step applies to the Modify Comment Period wizard To Delete a CARA Project, view the Project homepage section. If Finish button was clicked at an earlier step in the CARA Project Setup Wizard, the following values will be applied by default: -No New Team Members will be Added -No Documents will be Associated -Basic Coding Structure will be Applied -No Custom Codes will be created -Economic List of Term will not be activated (Request for Comment Extension, Threats, and Request for Information will be activated).

Work flow	Step 1: You can verify the project information from the Project Summary. You may click on Edit to modify the CARA Comment period's Duration, Description, or Start date.  Step 2: You can verify the CARA Project's Comment Period Team Members, Coding Structure, Associated Documents, or the Auto- Markup terms by clicking on the appropriate tab. You may click on Edit button and modify any changes, followed by the Finish button to jump back to the CARA Project Acceptance page.

You may click on Printable summary to view and print the information associated with this project/ comment period set-up

Printable Summary

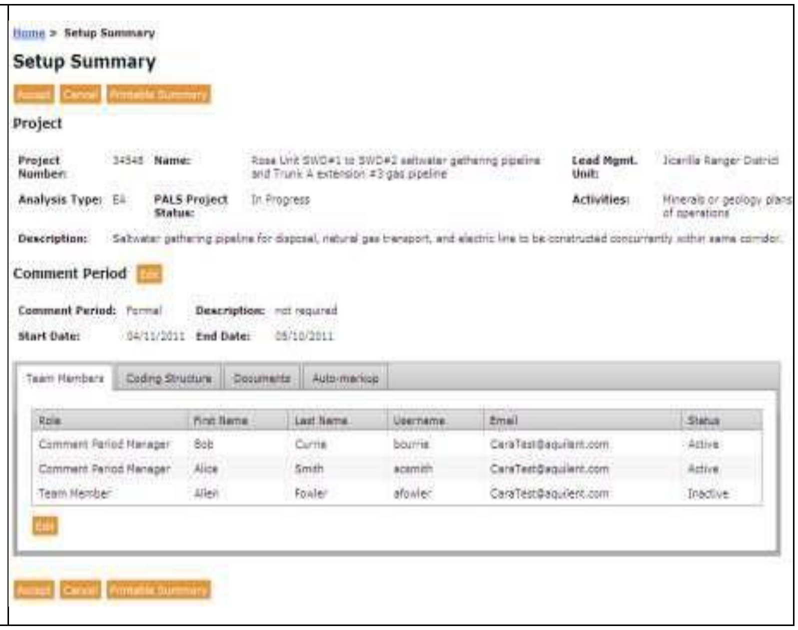


Step 3: Once you have verified all the information is correct, you can click on Accept and Go to the Projects Homepage

Accept

You may also click on Cancel and discard this current project/comment period set-up action.

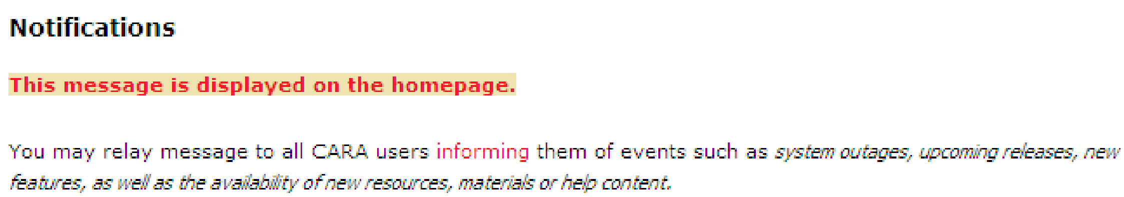
Authorized Roles	Super Users, Coordinators, Project Managers, Comment Period Managers

Image	

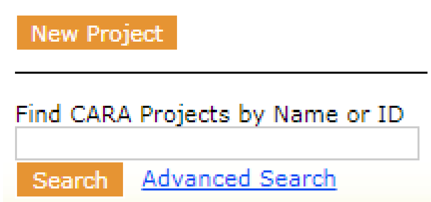
9.3 CARA Homepage

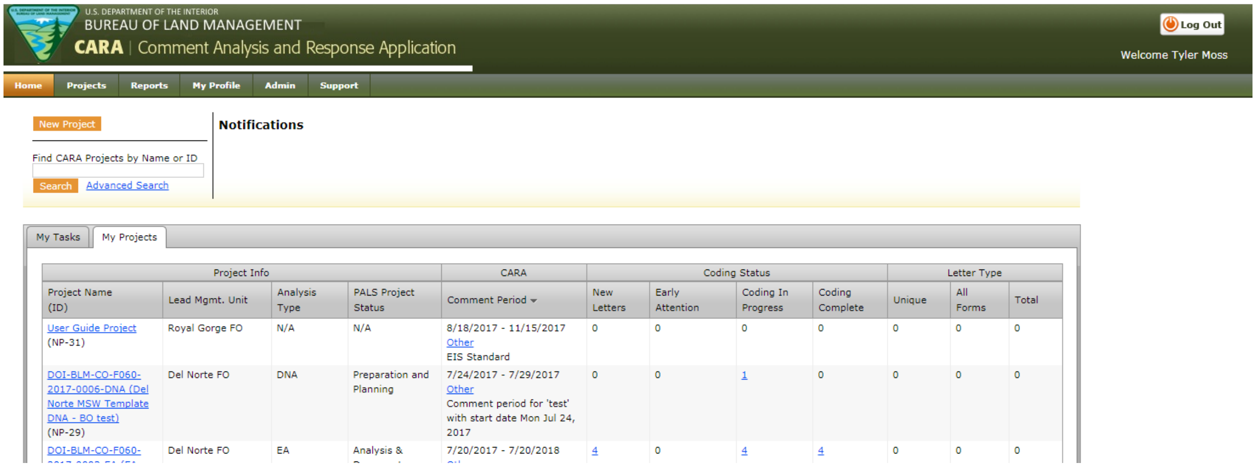
The CARA homepage consists of three main components namely the Welcome message, The functions to create or search for a project, as well as the My Projects table. The Welcome message is published by the CARA Super Users for all CARA users to view upon login.

Keep an eye on the Welcome messages (Notifications) for important CARA information!



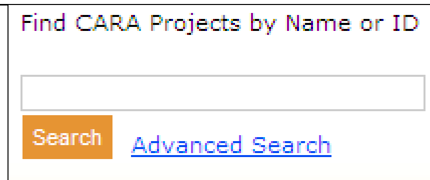
The Super Users, and Coordinators will find the Create New Project button only on the CARA homepage.





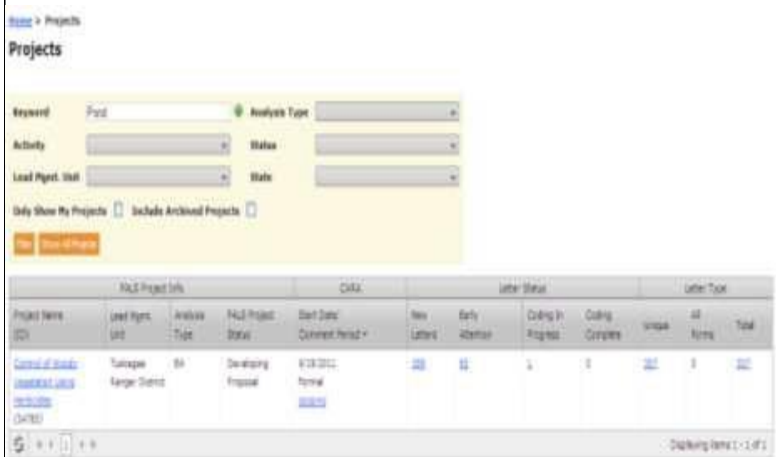
9.3.1 Search for a CARA Project

Function	Allows the user to search for a CARA Project by its Name or ID. Partial name search is supported. A minimum of 4 letters are required. You may click on Advanced Search Advanced Search link to go to the (Project listing page where more search options will be made available.
Work flow	Step 1: You can type the name of the Project (minimum of 4 letters), or type the full ID of the project in the text field provided.

<table>
<tr>
<td></td>
<td>


Step 2: Click on Search button to perform the search.

Step 3: The results will be displayed on the Project listing page.



</td>
</tr>
<tr>
<td>Authorized Roles</td>
<td>All</td>
</tr>
</table>

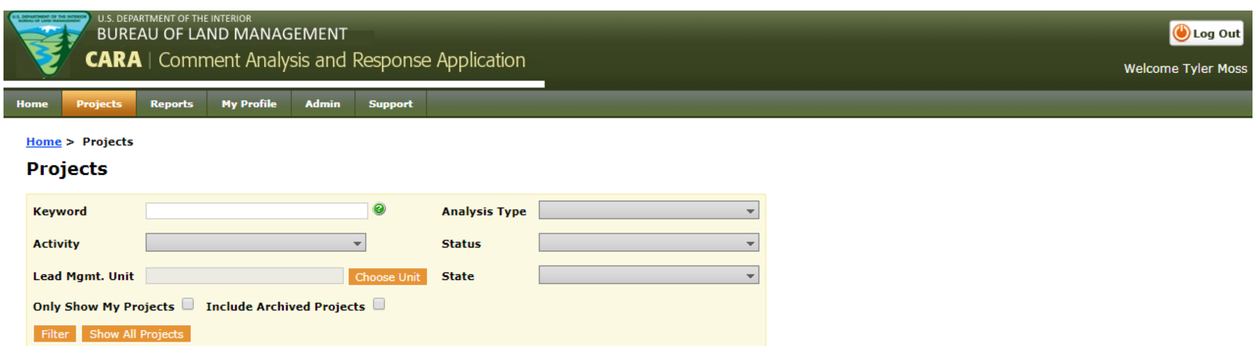
9.3.2 My Projects Table

Project Info				CARA	Coding Status				Letter Type		
Project Name (ID)	Lead Mgmt. Unit	Analysis Type	PALS Project Status	Comment Period	New Letters	Early Attention	Coding In Progress	Coding Complete	Unique	All Forms	Total
User Guide Project (NP-31)	Royal Gorge FO	N/A	N/A	8/18/2017 - 11/15/2017 Other EIS Standard	0	0	0	0	0	0	0
DOI-BLM-CO-F060-2017-0006-DNA (Del Norte MSW Template DNA - BO test) (NP-29)	Del Norte FO	DNA	Preparation and Planning	7/24/2017 - 7/29/2017 Other Comment period for 'test' with start date Mon Jul 24, 2017	0	0	1	0	0	0	0
DOI-BLM-CO-F060-2017-0003-EA (EA WORKFLOW TEST 1) (NP-26)	Del Norte FO	EA	Analysis & Document Preparation	7/20/2017 - 7/20/2018 Other Comment period for 'Environmental Assessment' with start date Thu Jul 20, 2017	4	0	4	4	0	0	0
TEST post UI (NP-23)	No Value	OTHER_NEPA	Completed and Monitoring	7/11/2017 - 12/31/9999 Other Description ipsum	0	0	0	0	0	0	0
CARA DEMO 1 (NP-19)	No Value	OTHER_NEPA	Completed and Monitoring	5/8/2017 - 12/31/9999 Other Comment Period #2	0	0	0	0	0	0	0
CARA DEMO 1 (NP-19)	No Value	OTHER_NEPA	Completed and Monitoring	4/25/2017 - 4/25/2017 Other TEST	0	1	0	1	0	0	0
TEST Project demo (NP-16)	No Value	OTHER_NEPA	Completed and Monitoring	4/11/2017 - 12/31/9999 Other TEST Description	0	0	0	0	0	0	0
TEST 2 (NP-17)	No Value	OTHER_NEPA	Completed and Monitoring	4/11/2017 - 4/11/2017 Other test	0	0	0	0	0	0	0
Tyler Test Project NO PALS (NP-14)	No Value	OTHER_NEPA	Completed and Monitoring	3/22/2017 - 12/31/9999 Other TEST for NO PALS	0	0	0	0	0	0	0
testing 10017 (10017)	No Value	CX	Analysis & Document Preparation	3/13/2017 - 6/10/2017 Other TEST	0	1	1	0	0	0	0

1 2 Displaying items 1 - 10 of 15

You may sort the columns by either a ascending approach (e.g., a … to … z, 1 … to 100), or an descending approach (e.g., z … to … a, 100… to … 1)

9.3.3 My Projects Home Page



Project Info				CARA	Coding Status				Letter Type		
Project Name (ID)	Lead Mgmt. Unit	Analysis Type	PALS Project Status	Comment Period	New Letters	Early Attention	Coding In Progress	Coding Complete	Unique	All Forms	Total
User Guide Project (NP-31)	Royal Gorge FO	N/A	N/A	8/18/2017 - 11/15/2017 Other EIS Standard	0	0	0	0	0	0	0
DOI-BLM-AK-A000-2014-0005-CX (copy documents test) (NP-30)	Anchorage DO	CX	Analysis & Document Preparation	7/26/2017 - 8/3/2017 Other Comment period for 'test' with start date Wed Jul 26, 2017	0	0	0	0	0	0	0

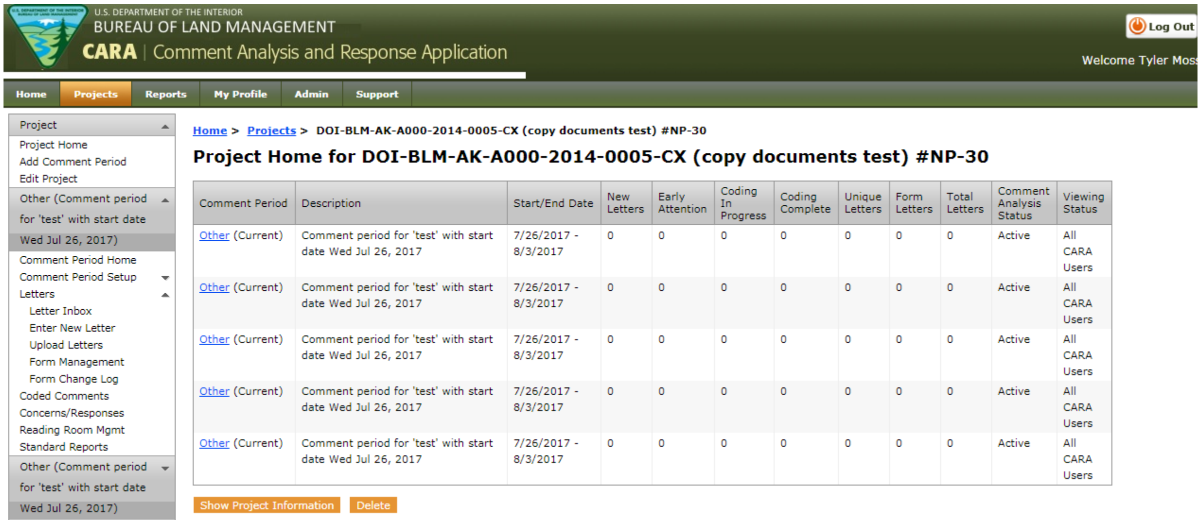
You may sort the columns by either a ascending approach (e.g., a … to … z, 1 … to 100), or an descending approach (e.g., z … to … a, 100… to … 1)

For more information about the display results table please visit the My Projects table section above, or click here.

Number of rows displayed on the Project listing page is designated in the My Profile tab.

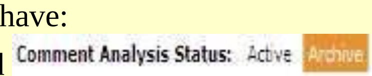
The CARA Project homepage provides the user with pertinent Project information. Including the Comment Period and Letter ingress information.

The only way to delete a CARA Project is from that particular CARA Projects Homepage.



Comment Period	Description	Start/End Date	New Letters	Early Attention	Coding In Progress	Coding Complete	Unique Letters	Form Letters	Total Letters	Comment Analysis Status	Viewing Status
Other (Current)	Comment period for 'test' with start date Wed Jul 26, 2017	7/26/2017 - 8/3/2017	0	0	0	0	0	0	0	Active	All CARA Users
Other (Current)	Comment period for 'test' with start date Wed Jul 26, 2017	7/26/2017 - 8/3/2017	0	0	0	0	0	0	0	Active	All CARA Users
Other (Current)	Comment period for 'test' with start date Wed Jul 26, 2017	7/26/2017 - 8/3/2017	0	0	0	0	0	0	0	Active	All CARA Users
Other (Current)	Comment period for 'test' with start date Wed Jul 26, 2017	7/26/2017 - 8/3/2017	0	0	0	0	0	0	0	Active	All CARA Users
Other (Current)	Comment period for 'test' with start date Wed Jul 26, 2017	7/26/2017 - 8/3/2017	0	0	0	0	0	0	0	Active	All CARA Users

9.4 Deleting a CARA Project

Function	Allows the Super Users, and Coordinators to Delete a CARA Project. The option to Delete a CARA Project is only available from the Corresponding CARA Projects homepage You may only Delete a CARA Project if any of its Comment Periods have: Not been Archived  and Not received any Letters

	New Letters	Early Attention	Coding In Progress	Coding Complete	Unique Letters	Form Letters	Total Letters
	0	0	0	0	0	0	0

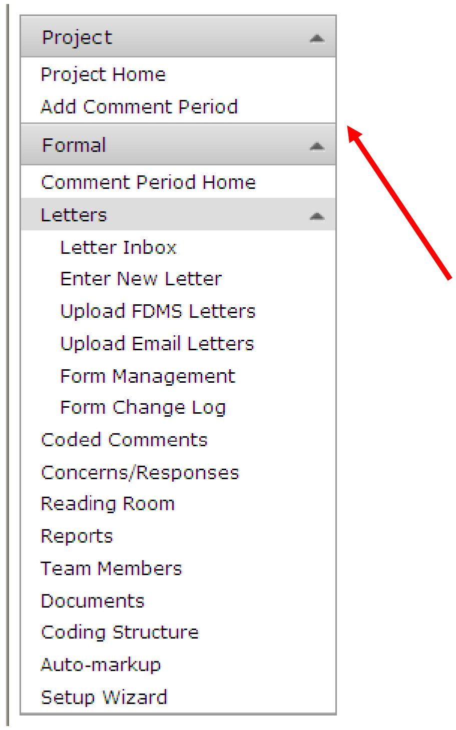
Work flow	Step 1: From the Project homepage of the project you wish to delete, click on the Delete button. Step 2: Click OK to confirm the Deletion This is an Irreversible step.
Authorized Roles	Super Users, Coordinators
Image	

9.5 CARA Comment Periods

Every CARA Project must at least include 1 Comment period. From the Comment Period homepage the users have access to all major functional aspects of CARA (e.g., Team Management, Coding Comments, and Responding to Concerns). The only way to delete a Comment period is from the Comment Period homepage.

9.5.1Adding a Comment Period not associated with a Back Office project

In order to add a Comment Period click on the Add Comment Period link from the Left navigation. This will bring you back to the Set up Wizard so that you may create another CARA Comment Period for the same CARA Project. For more information visit the CARA Project Creation (Set up Wizard) section.



9.5.2 Modifying a Comment Period

In order to modify a Comment Period click on the Setup Wizard from the Left navigation or the Setup Wizard link located on the Comment Period homepage. This will bring you back to the Set up Wizard so that you may modify the current CARA Comment Period.

9.6 Managing the Comment Period (Comment Period homepage)

From the Comment Period homepage the users have access to all major functional aspects of CARA (e.g., Team Management, Coding Comments, and Responding to Concerns). You may also designate this Comment Period for viewing by the Team only, or all CARA users. You may Archive this Comment Period, or make it active again from the Comment Period homepage. Additionally, the Public Reading Room associated with this comment period can be Activated or Deactivated. A link to the Public Reading Room will be displayed on this page if the Reading Room status is "Active".

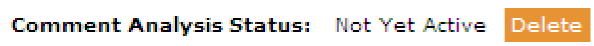
Modifying the Comment Period attributes (e.g., Team Members, Coding Structure, Reading Room Status) are only available for the Super Users, Coordinators, Project Managers, and Comment Period Managers.

The Date displayed is the duration of this Comment Period.

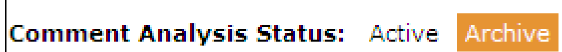
The Description displayed is the type of Comment Period (Formal, Informal, Objection), followed by the description of the Comment period provided at Comment Period Setup.

Function	Allows the user to manage multiple aspects of a CARA Comment Period, including: Comment Analysis Status Viewing Status Team Members Reading Room Status Letters Comments Concerns/Responses Coding Structure Documents Auto-Markup

<table>
<tr>
<td>Work flow</td>
<td>
Step 1: Comment Analysis Status: A Comment Period that is created ahead of its start date will have a status of Not Yet Active. The Comment Period will become Active once the start date of the duration has become the current date. Until then, you only have the option to Delete the Not Yet Started Comment Period.



Once all activities are finished within the Active Comment Period, you may wish to Archive it. From the CARA Comment Period homepage, click on the Archive button to archive the CARA Comment period.
Click OK to proceed.

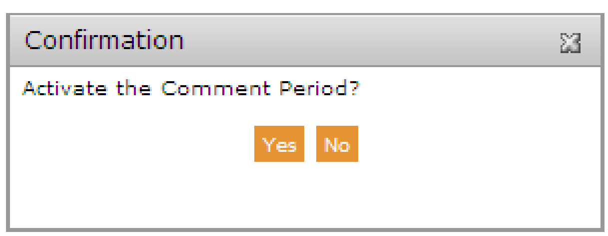


</td>
</tr>
</table>

Concern and Response statements, Letters, Annotations, and certain reports will be sent to the Datamart when a Comment Period is Archived. These will become a permanent part of the corresponding CARA Comment Periods record.

Once Archived, you may click on the Activate button set the Comment Period back to an 'active' status. Click OK to make the Comment Periods Active.

Concern and Response statements, Letters, Annotations, and certain reports which had



become Read Only will now be available for working upon. Data that was sent to the Datamart when a Comment Period was Archived will be overwritten once the Comment Period is Archived again.

This functionality is not available for Team Members

Step 2: Viewing Status: From the CARA Comment Period homepage, click on Set to Team Only button to restrict the search ability and viewing of this Comment period by the System Reader roles, as well other Team Members, Comment Period Managers, and Project Managers who are not a part of this Comment Period. Click OK to Proceed. Once Set to Team Only this Comment Period will not show up on Reports, or the Project Listing page.

Once set to Team Only, Click on Set to All CARA Users button to make this CARA

Comment Period Accessible by all roles once again. Click OK to confirm.

This functionality is not available for Team Members

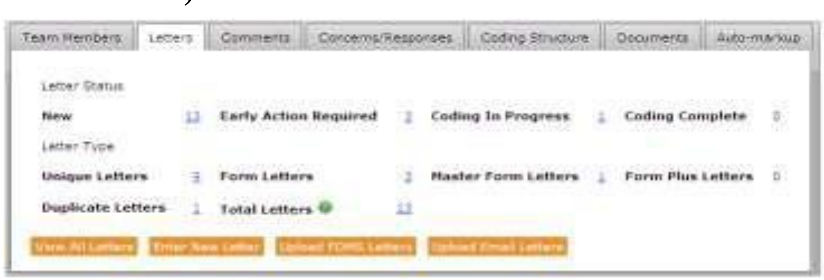
Step 3: Reading Room Status: From the CARA Comment Period homepage, click on “Activate” to enable the Public Reading Room for this comment period. When the Public Reading Room is “Active” a link to the webpage will be displayed. Click on “Deactivate” to disable the Public Reading Room. A confirmation message will be displayed.

Step 4: Team Members: After reviewing the Team Members for the Comment Period,

You can click on the Manage button to begin modifying the Team Members for this Comment Period. For more information about adding Team members, please visit the Setup wizards Team member step, or click here.

Manage Team Members functionality is not available to the Team Members

Step 5: Letters: The Letters view provided from the Comment Period homepage consists of Filtered Inbox views as well as letter ingress options (e.g., Enter New Letter, Upload FDMS Letters, and Upload Email Letters).



Filtered Letter Inbox views include: New, Early Attention, Coding In Progress, Coding Complete, Unique Letters, Form Letters, Master

Form Letters, Form Plus Letters, Duplicate Letters, and Total Letters.

Upon clicking on the corresponding number next to these options you will be taken to the Letter Inbox with the view filtered per your selection.

Actions include View All Letters - which allows you to go to the Letter Inbox will all letters visible, Enter New Letter– which allows you to create a new letter (more information provided in the CARA Letter Creation section), Upload FDMS Letters – which allows you to upload FDMS letters (more information provided in the CARA Upload FDMS Letters section), and Upload Email Letters – which allows you to upload Email letters (more information provided in the CARA Upload Email Letters section).
Available to Team Members for this Comment Period

Step 6: Comments: From the CARA Comment Periods homepages Comments section you can view a sectioned view of the codes used for creating comments. Clicking on the number next to the corresponding Code type (e.g., Action, Document, Appeals) will take you to the CARA Coded Comments page with the filtered view you selected (e.g., show the Action code types). Clicking on the View All Comments button will take you to the CARA Coded Comments page and display all coded comments.
Available to Team Members for this Comment Period

Step 7: Concern/Responses: From the CARA Comment Periods homepages Concerns/Responses section you can view a sectioned status view of the Concerns/Responses. The status types include In Progress, Ready for Response, Response in Progress, and Responded. Clicking on the number next to the status type will take you to the CARA Concerns/Response page with the filtered status view you selected. Clicking on the View All Concerns/Responses button will take you to the CARA Concerns/Responses page and display all coded comments. Clicking on the Create Concern/Response button page will

begin the process for creating a Concern/Response statement. For more information on creating a Concern statement or a Response visit the Concern and Response section, or click

here.
Available to Team Members for this Comment Period

Step 8: Coding Structure: After reviewing the Coding Structure for the Comment Period,

You can click on the Manage button to begin modifying the Coding Structure for this Comment Period. For more information about the coding structure modification, please visit the Setup wizards Customize Coding structure step, or click here.
Manage Coding Structure functionality is not available to the Team Members

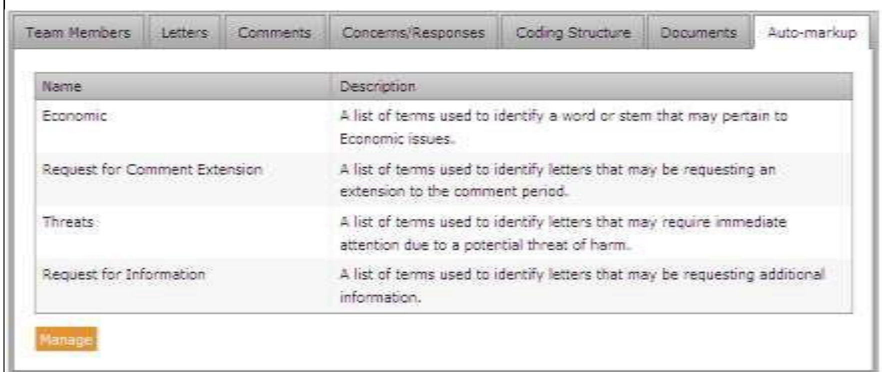
Step 9: Documents: After reviewing the Documents that have been associated with this Comment Period,

Document	Size
Notice of Intent - Federal Register	129kb

You can click on the Manage button to begin the Document association process for this Comment Period. For more information about the document association process, please visit the Setup wizards Document Association step, or click here.

Manage Document association functionality is not available to the Team Members

Step 10: Auto-Markup: After reviewing the List of Terms that have been activated for this Comment Period,



Name	Description
Economic	A list of terms used to identify a word or stem that may pertain to Economic issues.
Request for Comment Extension	A list of terms used to identify letters that may be requesting an extension to the comment period.
Threats	A list of terms used to identify letters that may require immediate attention due to a potential threat of harm.
Request for Information	A list of terms used to identify letters that may be requesting additional information.

You can click on the Manage button to begin the Auto-Markup List of Terms activation process for this Comment Period. For more information about the Auto-Markup process, please visit the Setup wizards Select Auto-Markup step, or click here.

Manage Auto-markup functionality is not available to the Team Members

Users may activate additional Auto-markup list of terms for their individual CARA sessions

Super Users, Coordinators, Project Managers, and Comment Period Managers unless otherwise stated.

9.7 Deleting a Comment Period

<table>
<tr><td>Function</td><td>Allows the Super Users, and Coordinators to Delete a CARA Comment Period.
The option to Delete a CARA Comment Period is only available from the Corresponding CARA Comment Periods homepage
You may only Delete a CARA Comment Period if it has: Not been Archived Comment Analysis Status: Active Archive and Not received any Letters
<table><tr><th>New Letters</th><th>Early Attention</th><th>Coding In Progress</th><th>Coding Complete</th><th>Unique Letters</th><th>Form Letters</th><th>Tot Let</th></tr><tr><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td></tr></table></td></tr>
<tr><td>Work flow</td><td>Step 1: From the Comment Periods homepage click on the Delete button.
Comment Analysis Status: Active Archive Delete

Step 2: Click OK to confirm the Deletion

Confirmation
Comment Period will be deleted. Do you wish to continue?
Yes No

This is an Irreversible step.</td></tr>
<tr><td>Authorized Roles</td><td>Super Users, Coordinators</td></tr>
<tr><td>Image</td><td>Formal Comment Period

Date: 08/09/2011 - 09/07/2011
Description: Formal PRR Testing
Comment Analysis Status: Active Archive
Viewing Status: All CARA Users Set to Team Only
Reading Room Status: Active Deactivate
Setup Wizard | Reports | Public Reading Room</td></tr>
</table>

9.8 Completing Letters, Coding and Comment/Response

For the remaining information needed to continue refer to section 8.5 Letters of this manual as the remaining information mirrors that for ePlanning projects. Chapter 10. Maps in ePlanning

10.1. Introduction to Maps within ePlanning

Maps are an essential part of the planning process and are included in many NEPA documents. This chapter will describe a new process for utilizing collaborative maps that you can use with your ePlanning projects. This new interactive web map feature is similar to using maps through Google, Yahoo, or Bing. At the moment, it will allow for some very basic geospatial commenting, but some additional commenting tools are in the works, for these new map features.

There are three types of maps that will be discussed in this chapter: PDF Maps, Comment Enabled Maps and Document-Linked Decision Maps. Alternatively, remember that you can use static map images as well. Refer to the Arbortext chapter (Chapter 6) for more information on how to do this. For the remainder of this chapter (and to distinguish from the use of static map images), the maps using these new feature will be referred to as **webmaps**.

This chapter is not focused on the technical GIS process for creating a map from scratch, rather it will show how ePlanning can use these maps once they are ready for a project.

10.1.1. Objectives

Upon completion of this chapter, you will be able to:

- Set up PDF maps in Back Office.
- Set up a Comment Enabled map in Back Office that will be seen by the public and can be commented on.
- Describe the process for analyzing the geospatial map comments received from the public.

10.2. An Overview of the ePlanning Map Feature

Note

If you have technical questions or concerns with working with these webmaps in ePlanning, please submit your issue or question to the ePlanning group via a Remedy ticket. A member of the ePlanning user support team will get back to you as soon as possible.

10.3. Adding a PDF Map

One way to add a map to the project folder is to drag and drop files from your computer. In the Document List section, open the D2 file folder where you want to place the map file, perhaps the GIS folder. Then open your computer's File Explorer and drag and drop the maps(s) into the Document List section.

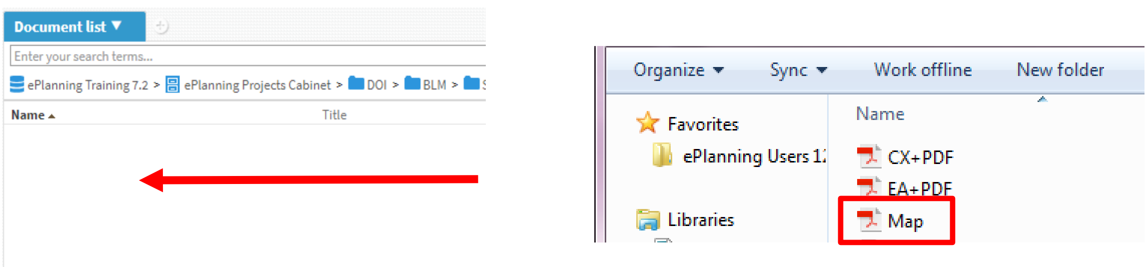


Figure 5.4

You may also add a map to your file folder by clicking the import function on the black D2 menu bar. Start by selecting the file folder you want to import the document(s) to and then click **IMPORT**.

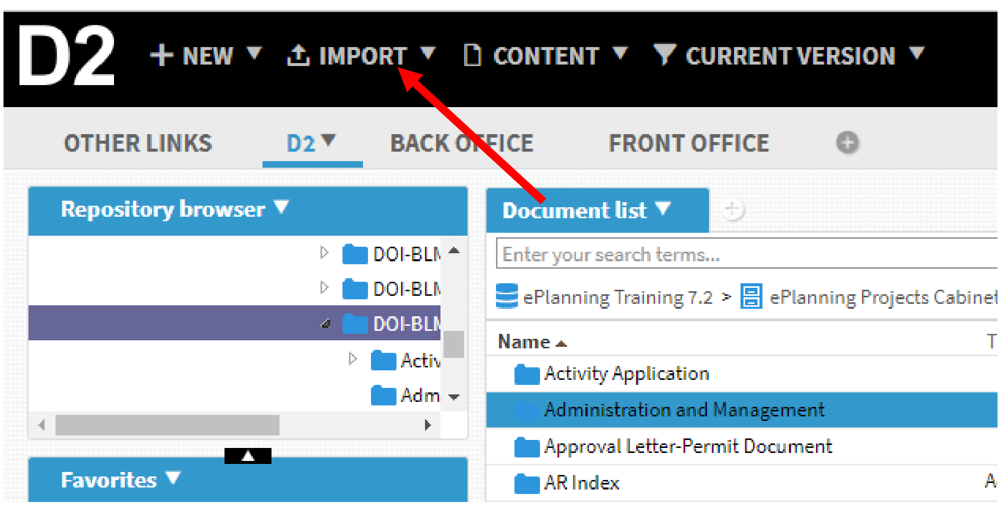
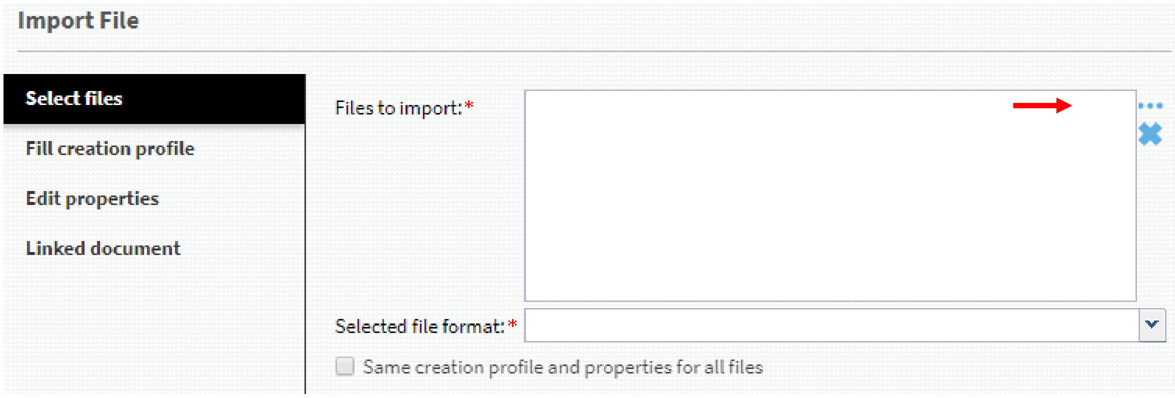


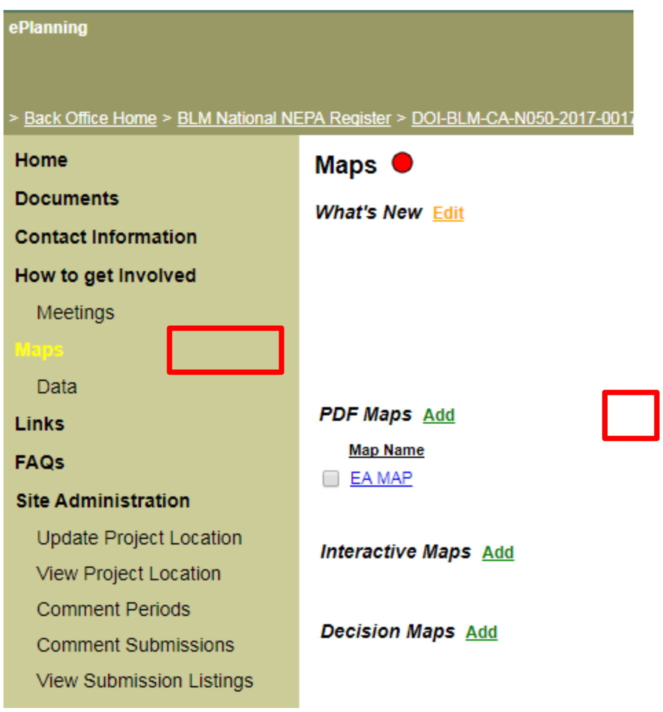
Figure 5.5

To get to the file browser, you can either double-click in the blank "Files to import:" window or click on the ellipses (…) to the right of that window. Choose the map(s) you want to add.

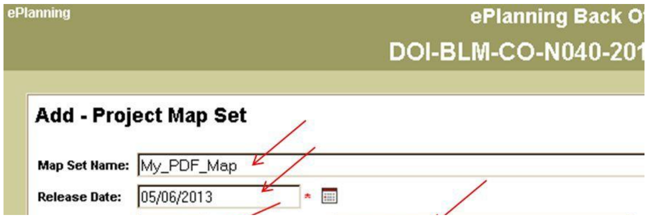
Then start completing the required information in the **Import File** screens. Complete the remaining screens by accepting defaults and clicking the **Next** button until your file is transferred into your project folder.



The next step is to log into **Back Office**, select the project that you are working on, select the **Maps** link and choose **Add** next to **PDF Maps**.

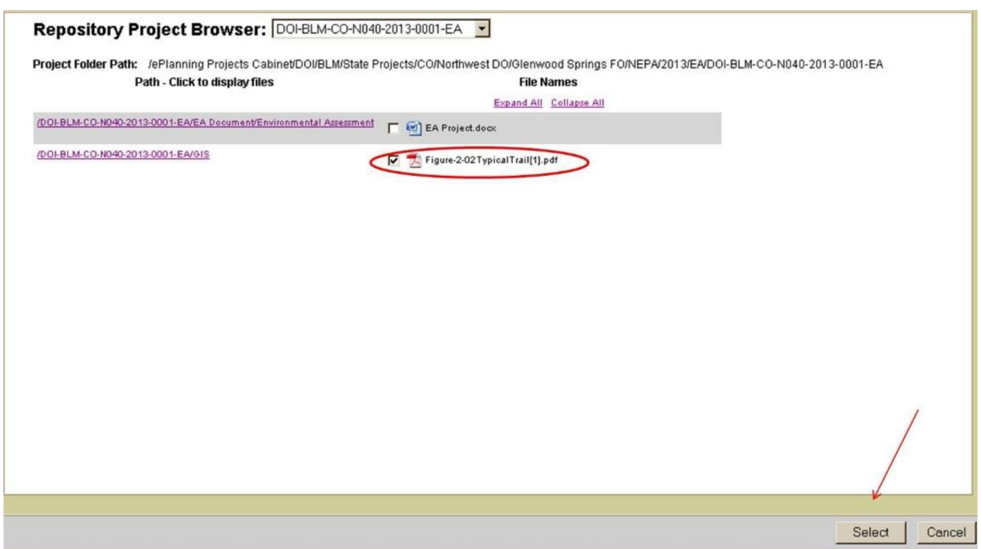


1. The **Add PDF Map** option brings up a new window. Type in a name for your map in the **Map Set Name** field, choose a release date, and add a category (optional) for readability by choosing **Other** from the drop down list and then supplying a name for the category. Click **Add** near the bottom of the window to add the file currently stored in the project's **GIS** folder.

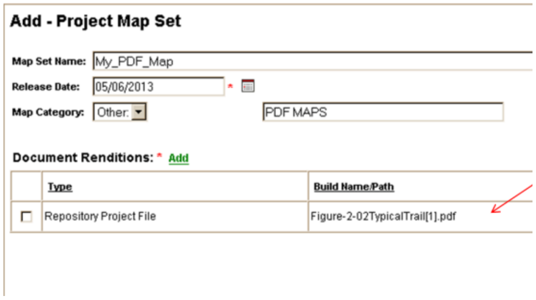


2. The next window prompts the user to choose a project from a drop-down list. Choose your current project and then select **Expand All** to show all the available files associated with the project.

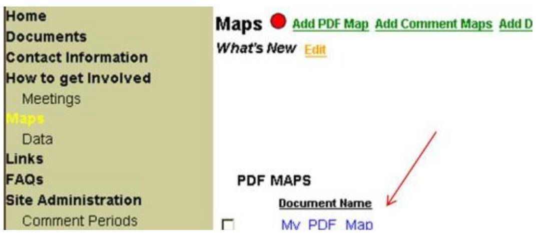
3. Use the check box to select the appropriate file and then scroll down and choose **Select**.



4. The selected file is now loaded into the list to be imported (in this case it is only one file), choose **Add** located in the lower right hand corner.



5. Now the **PDF Map** appears.



10.4. Preparing Comment Enabled Maps for your Project

Using **ArcGIS version 10.1**, maps (with the associated base map and layers) will be created by the GIS Specialist. The map data should be saved as a **service definition**. A project website format will have to be, initially, created and setup in Back Office. A comment period for a specific document will have to accompany any Comment maps created. A basic overview of the process is illustrated below.

Important

The GIS Specialist downloading the **service definition** must have an active ePlanning account in order to save the **service definition** to the ePlanning Project folder.

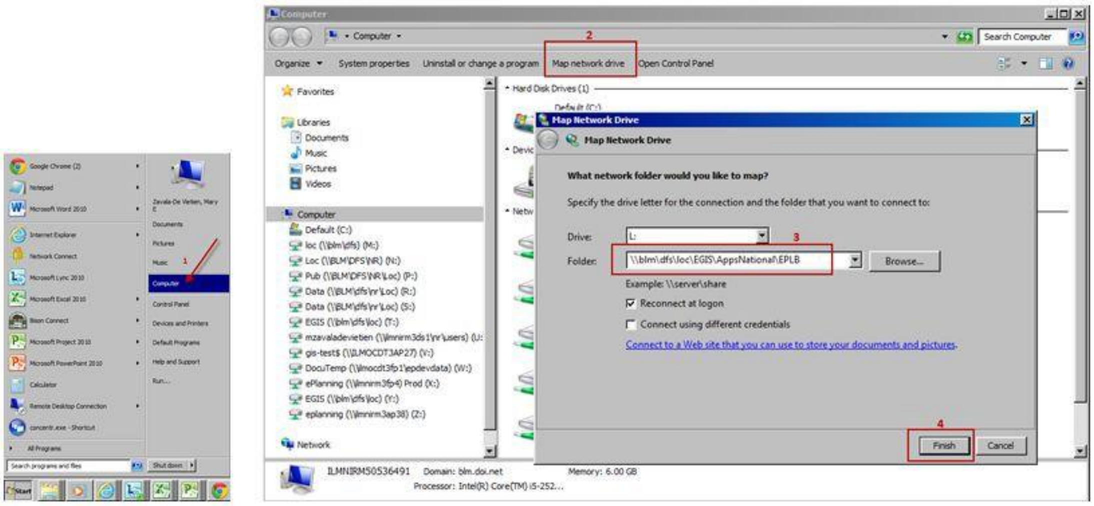
The Web-enabled maps will serve as a dynamic way for the public and agency users to place comments directly on a map at a specific point. A Service Definition (.sd) make it easy to share complete map documents with others. A service definition contains a map document (.mxd) and the data referenced by the layers it contains, packaged into one convenient, portable file. Service Definition files will be used for easy sharing of maps between colleagues in the ePlanning work group.

The following instructions will guide the GIS Specialist to create a service definition from ESRI ArcMap 10.1+ with the approved project layers for an existing ePlanning project. Any ePlanning user has the permissions to either publish or copy/paste a service definition file to the ePlanning folder within the EGIS drive (the direct path is \\blm\dfs\loc\EGIS\AppsNational\EPLB). Once a service definition is either published or copied/pasted to the EGIS drive, an ePlanning specific automation process will publish the service definition directly to the ePlanning ArcGIS server, which will automatically be available for selection in Back Office within 30-60 minutes. A project should first be created in Back Office before completing these steps.

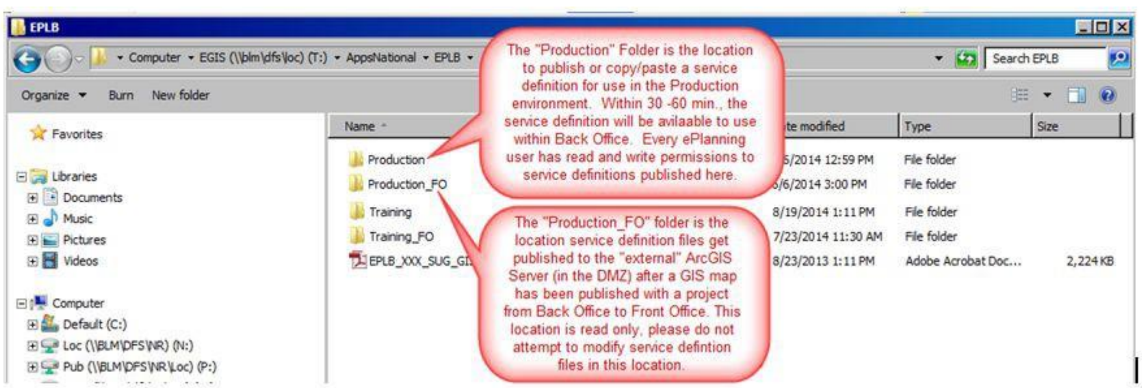
Mapping the ePlanning GIS Drive

Tip: An ePlanning GIS user can ‘Map a network drive’ on any desktop to the ePlanning GIS folder within EGIS drive for quick access. Follow these short instructions to properly map the ePlanning GIS folder to any desktop:

1. Navigate to **Start**, then **Computer**
2. Click Map Network Drive
3. Type in **blm\dfs\loc\EGIS\AppsNational\EPLB into the folder path**
4. Click **Finish.** This will now be a default drive in the user’s computer list.



The following screenshot is a preview of the “EPLB” Folder Structure:



Caution: Service definitions are supported from ESRI ArcGIS for Desktop version 10.1 onwards. The Map Services functionality is not available with 10.0 or lower version of ArcGIS.

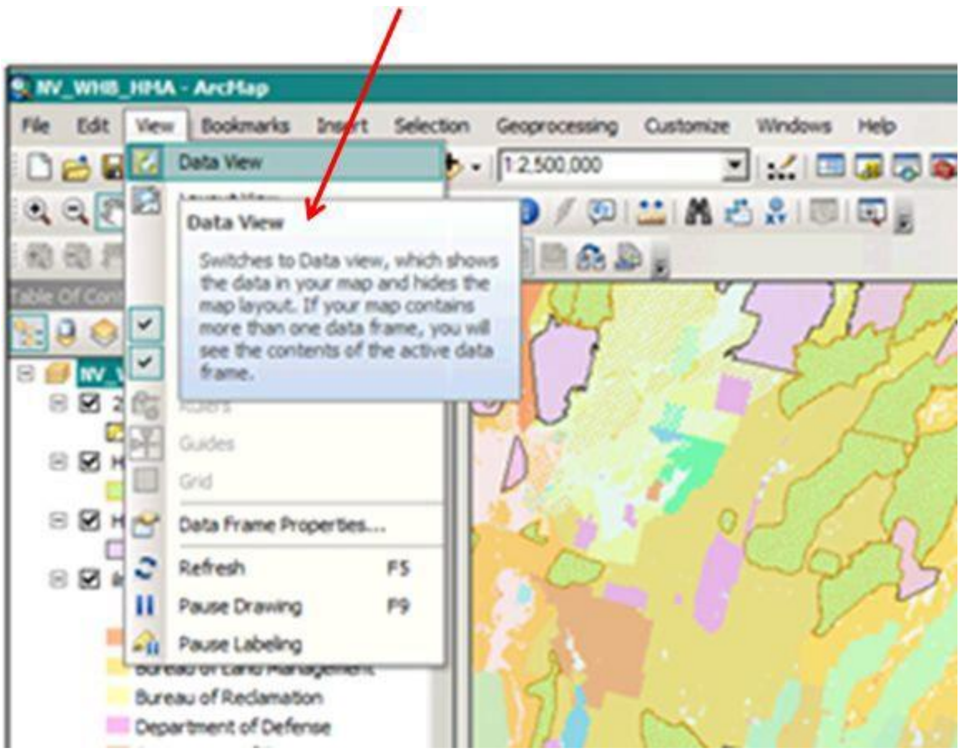
The following instructions will guide the GIS Specialist to create a service definition from ArcGIS with the approved project layers for an existing ePlanning project. This automation process will allow ePlanning team members to upload a map package directly to the GIS server, which will automatically be available for selection in Back Office within 4-8 hours. A project must be first created in Back Office before completing these steps.

Tip: Before packaging a map, be sure to enter descriptive information about it in the Map

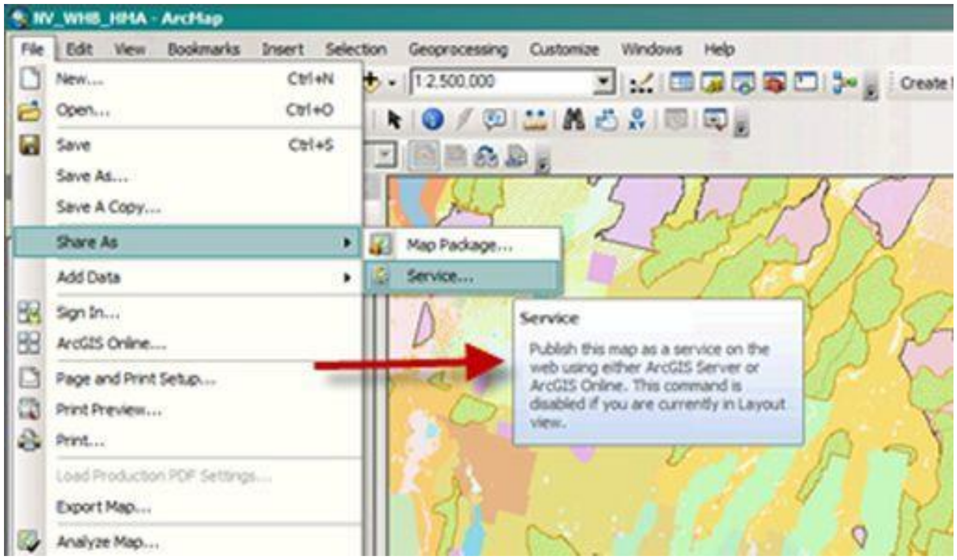
Document Properties dialog box. This information is built into the package and is accessible to others when you upload your service definition into ArcGIS Online. You can access this dialog box by clicking **File > Map Document Properties** on the main menu.

This section reviews the process for creating a service definition (.sd) file through ESRI ArcMap 10.1+ from an existing map. This assumes the BLM GIS user has already created a map (i.e., .mxd), and all layers on the map have been approved for publication. Use the following steps from ArcMap to create a service definition:

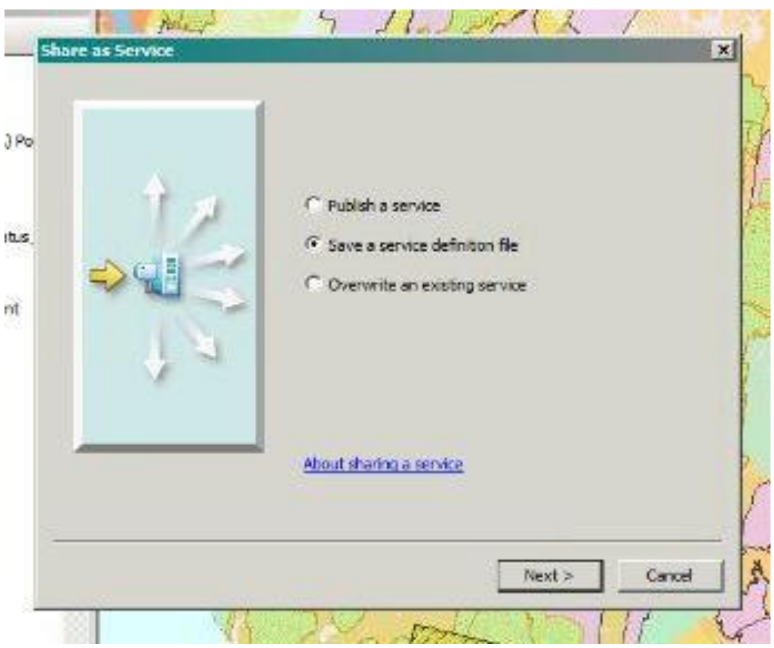
1. Make sure the map is in data view, by selecting **View>Data View** from the toolbar.



2. Click **File > Share As > Service** on the main menu.



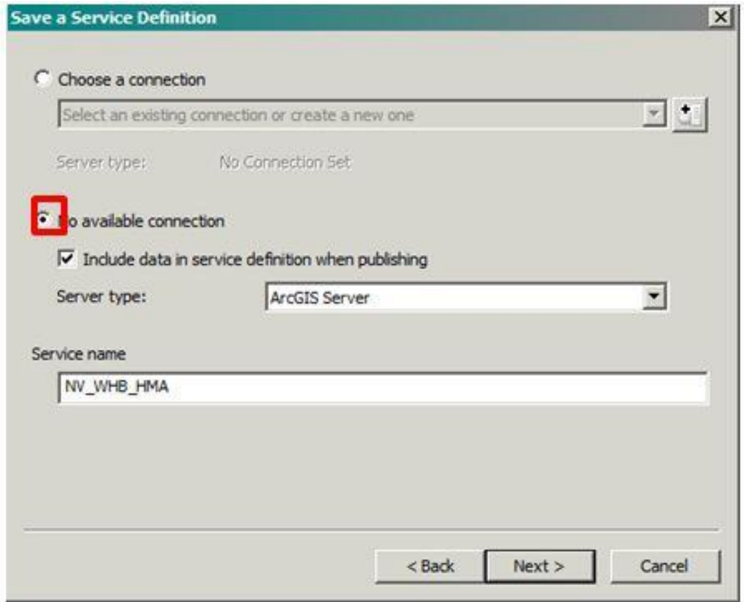
3. The **Share As Service** window will appear. Select **Save as a Service Definition**, and click
Next. (see image below)



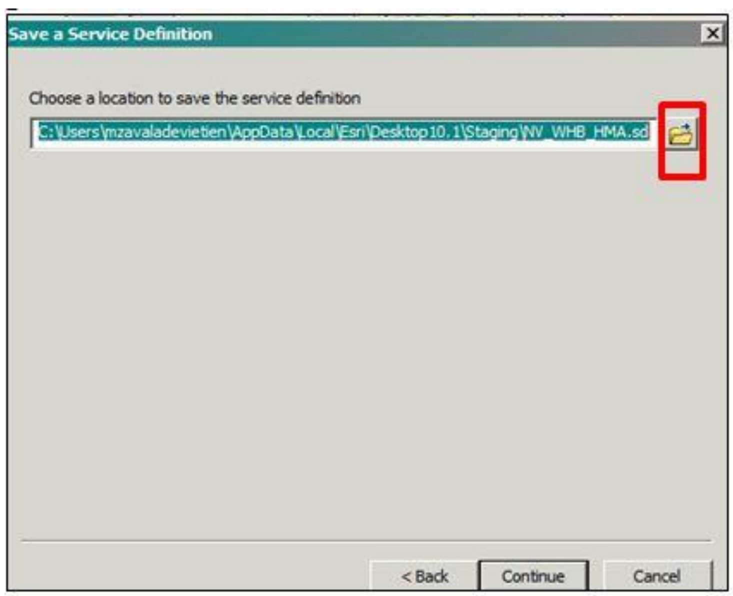
4. Ensure the box is checked reading "Include data in service definition when publishing". You can modify the service name of your map, as this will appear for selection in Back Office. Keep all other default settings for the following **Share As Service Definition** window, and click **Next.**

The name cannot be more than 120 characters long and may contain only alphanumeric

characters and underscores.



5. Choose a location to save the service definition. Click on the **Folder** icon to choose the location for saving the service definition.

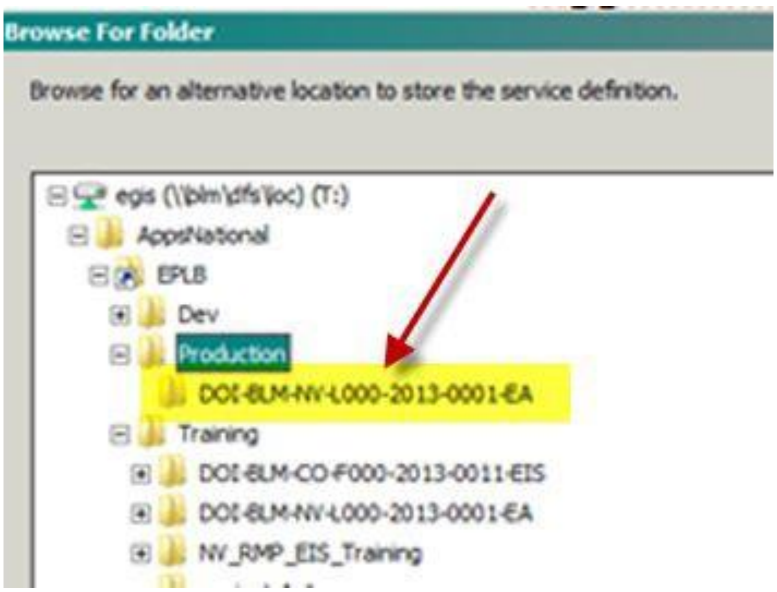


a. The user can either save the service definition directly to the ePlanning Project Folder, preferred, or save it to a local drive and then copy/paste it into the ePlanning spatial folder location.

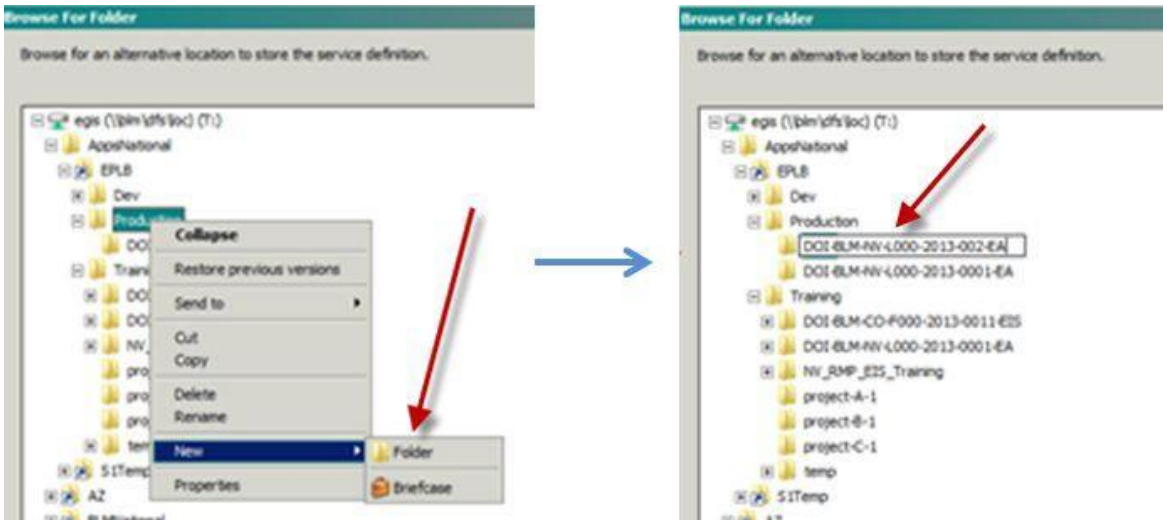
To save directly to the ePlanning Project folder (**blm\dfs\loc\EGIS\AppsNational\EPLB**)>Production>ePlanning Project Folder:

If a user is using ArcMap through the Citrix>ePlanning instance, this "EGIS>AppsNational>EPLB" folder is mapped by default and will appear automatically when in this step.

If a user is using ArcMap from the Citrix>EGIS instance, or from a local desktop, it is beneficial to first map this network drive to the local desktop. This is explained above in "Mapping the ePlanning GIS Drive.



b. If a project folder has not been created yet, right-click over the Production folder and select **New Folder** to create a new project folder. **The name of the folder has to match the project name in Back Office exactly, or else the service definition will not show up by default for the project when in Back Office. If a GIS ePlanning user wants to create a folder not associated with one project, but to be used by the entire BLM Office, any folder description can be entered. (Example: the Colorado State Office has multiple maps to be used by the entire state of Colorado. The GIS ePlanning user could create a folder named "Colorado Maps" that will not default to any project, but can be accessed and used by any NEPA or LUP project.)**

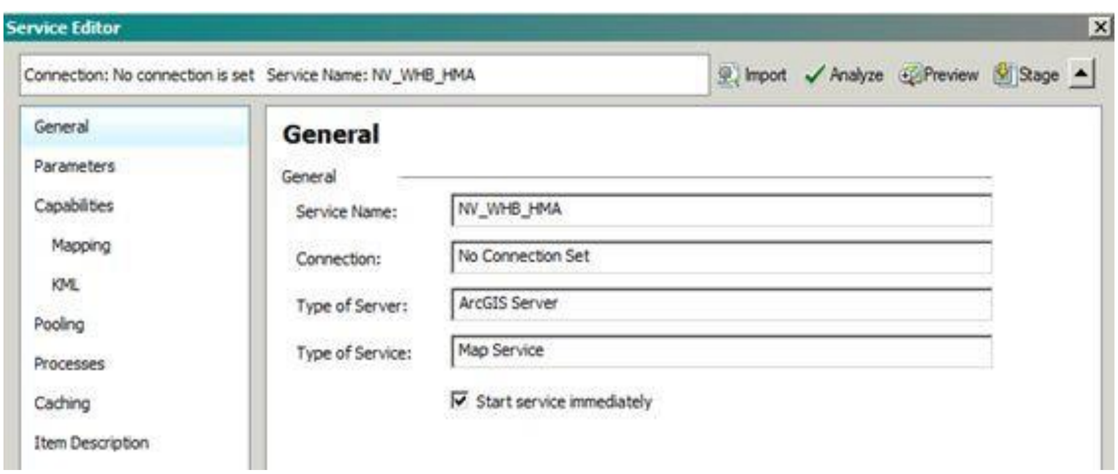


c. For RMP projects that do not have an automatic National Environmental Protection Act (NEPA) number assigned, only letters, numbers, spaces, underscores, or hyphens can be used in the Official Project Name that appears in Back Office and Front Office. If other special characters are included, please contact the Team Lead to modify the project name in Webtop.

Tip: The name of the project in Back Office can be copied and pasted as the folder name. Do not include any additional spaces before or after the name.

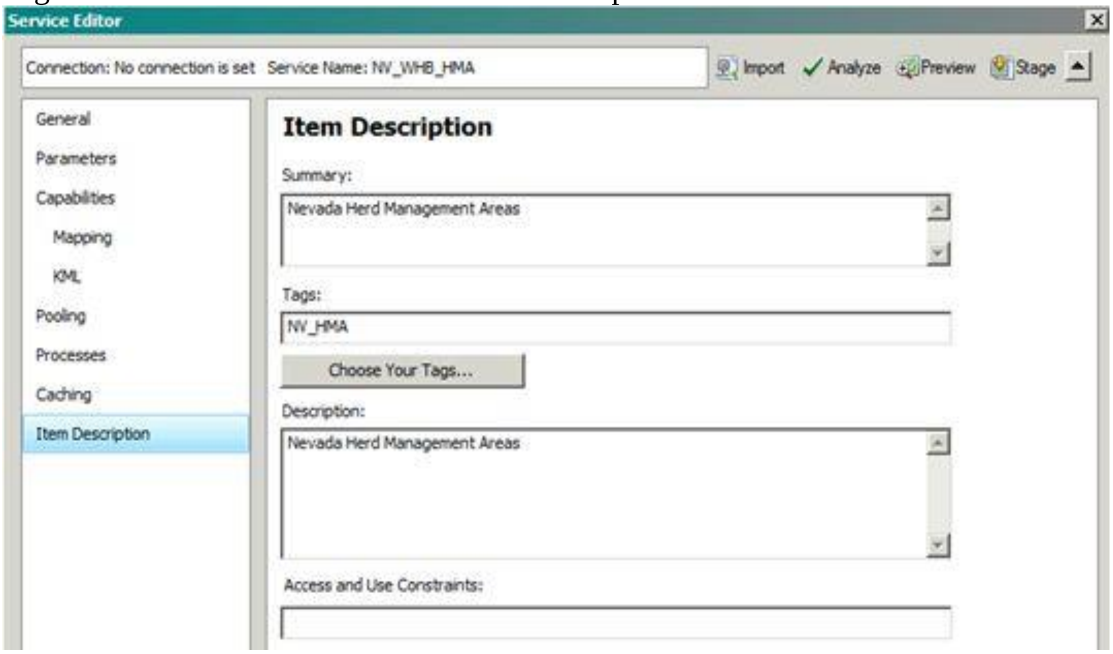
6. Once the folder location has been identifed, click **OK**. Click **Continue** to advance to the next screen.

7. The Service Editor window will now appear. No modifications need to be made to the default settings in the following tabs: **General** tab, **Parameters** tab, **Capabilities** tab, **Mapping** tab, **KML** tab, **Pooling** tab, **Processes** tab, and **Caching** Tab.



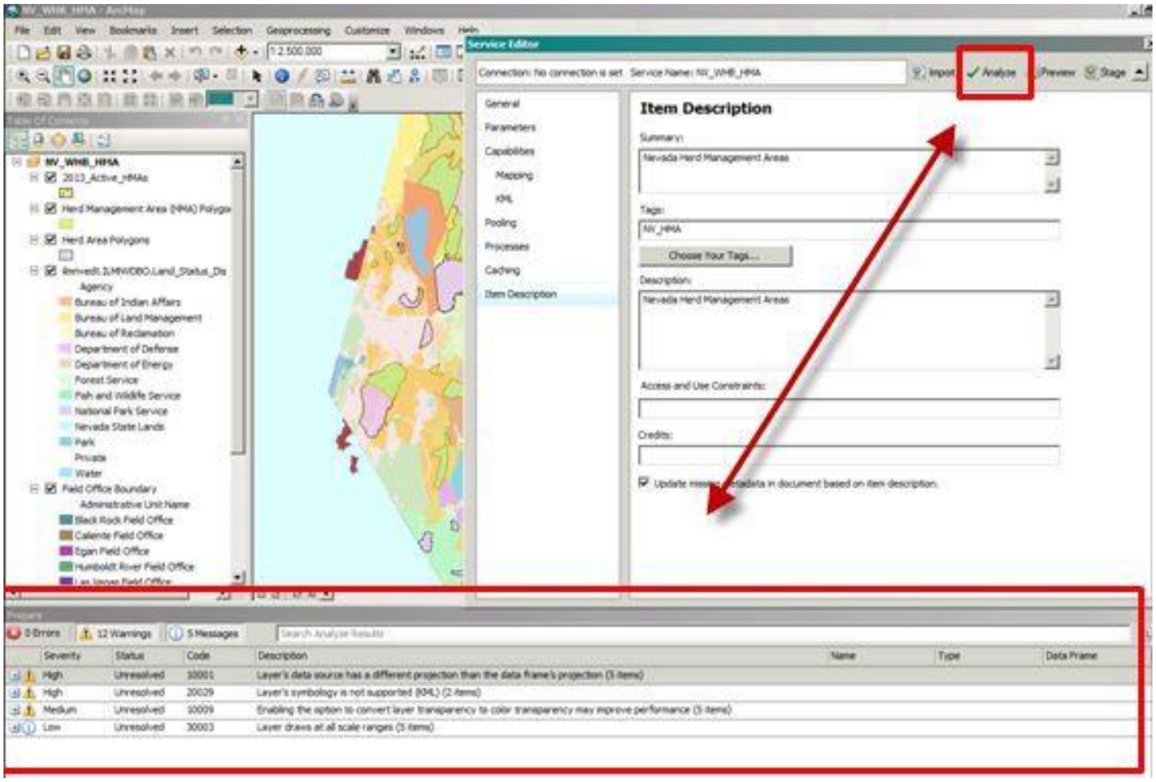
8. Navigate to the **Item Description** Tab and enter a **Summay**, check the default **Tags**, and enter a **Description.** Make sure that there is a check mark in the box commanding Update

missing metadata in document based on item description.



9. Click **Analyze** to validate your map for any errors or issues. You must validate and resolve all Critical, High, or Medium errors before being published. If any issues are discovered, a ***Prepare*** window will appear with a list of issues.

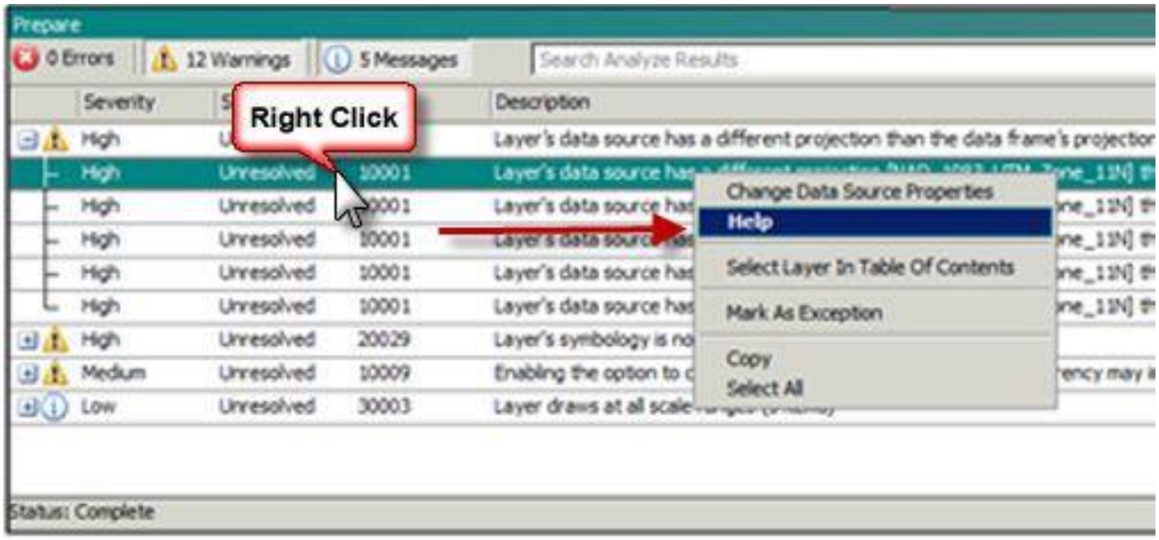
If a user needs more time to correct the issues in the analysis, close the Service Editor and save the service configuration as a draft. The user can continue their work by opening the draft in a future session in ArcGIS for Desktop. See **Opening a draft service in ArcGIS for Desktop** for full instructions.



When analyzing the GIS resource, the user will notice three types of messages in the Prepare window. The user can right-click each message to get a quick suggestion on how to address that specific issue. This will also give the user access to a help topic with more information, such as additional repair options. The item in bold in the Description column is the default approach for addressing each issue.

Type	Description
Error	These are issues that must be fixed before you can publish your GIS resource to the server.
Warning	These are issues in which performance, appearance, or data access may be affected. You have the option to address or ignore a warning. If you choose to ignore a warning, you can mark it as an exception by right-clicking the warning and choosing **Mark As Exception**.
Message	These informative messages suggest methods and best practices that can help you optimize your GIS resource for deployment on the server. You have the option to address or ignore a message. If you choose to ignore a message, you can mark it as an exception by right-clicking the message and choosing **Mark As Exception**.

Tip: Right-click on each **Prepare** message to get more information, read help for the error, and to click on suggested fixes. For additional guidance on error related messages, select the Help option to be taken to the ESRI help guide for that specific error.



10. Once validated, click: **Stage** to create the Service Definition. 

The Packaging process may take several minutes to process. The following messages will appear when packaging, and when the published to the designated location:

The Service Definition created will be available for selection in Back Office within 30-60 minutes upon completion of these steps. There is no email confirmation at this time, so please notify the ePlanning Team Lead to check the project in Back Office within the 30-60 minutes timespan.

Note: If the service definition you are publishing includes source GIS datasets, the size of the data and your network bandwidth will impact the time it takes to publish. Service definitions over 2 GB in size cannot be published using the Internet Explorer or Firefox web browsers. It's recommended that you use Google Chrome for service definitons over 2 GB

Once these maps have been loaded into the system, go into Back Office to start preparing the webmap for the NEPA or LUP project you are working on. In Back Office, you will setup the map layers that will be seen by the public.

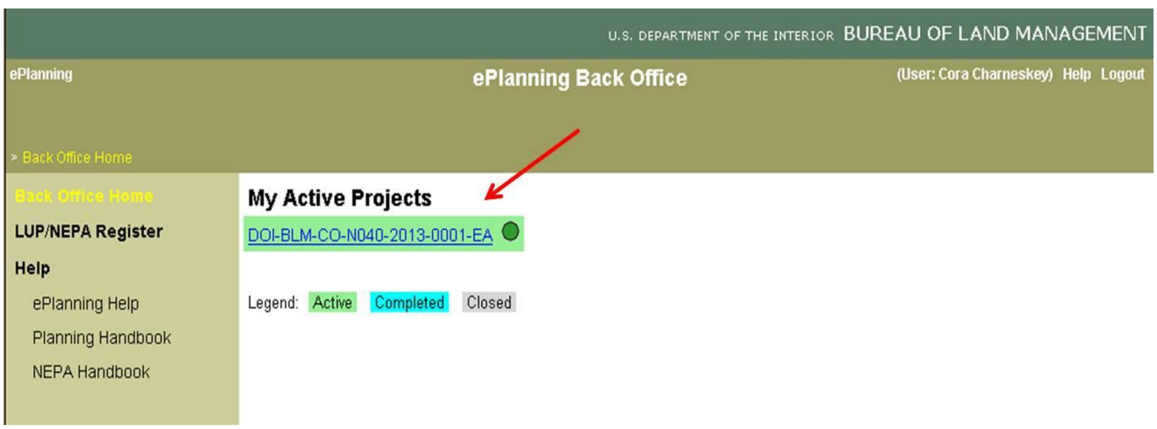
> **Note**
>
> These types of maps are best utilized for projects using the **Project Website**format, not the **Project Summary Website** format. Review the information in the Back Office/Front Office chapter from the basic ePlanning course for more information on how to setup your ePlanning website.

10.4.1. Setting Up the Comment Enabled Webmaps in Back Office

> **Example 10.1. Create the Comment Enabled Webmaps in Back Office**
>
> Jump into Back Office and create your maps for a project.

Create Comment Enabled webmaps for your project:

1. In the home screen in Back Office, select the project you are working on from the **My Active Projects** list. See example image below.



2. Select: **Maps** from the left navigation pane. This will display the page where maps are added to a project.

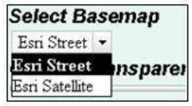
3. Click on **Add Comment Maps** at the top of the display page. This will display a map page where you will create the map(s) from the layers available.

a. The below image provides a high-level view of the entire map page. Each section is marked and will be referenced.

- **Navigation Pane:** This is the standard navigation menu that has always appeared in Back Office.
- **Map Definition Area:** This is where you name maps and add layers.
- **Map Area:** This is the area where the map layers will appear and where you will draw the extent that will be visible in Front Office.

b. Below is an explanation of the **Map Definition Area**.

- **Select a Comment Map** drop-down: Click on this to select, view, and edit an existing project map.
- **Preview Map:** This is enabled when an existing map is selected or a new map is created. This will allow you to view the map as the public would.
- **Name:** This is a required field when creating a new map. Enter a concise and intuitive name for your map.
- **Description:** This is an optional field when creating a new map. Enter a brief description of the map.
- **Layers:** As you add layers to a map, they will be listed in the **Layers** pane.
- **Create New Map:** Click to create a new map.
- **Delete Map:** Click to delete a map.
- **Select Basemap** dropdown. Click to change between Street and Satellite views on the



map.

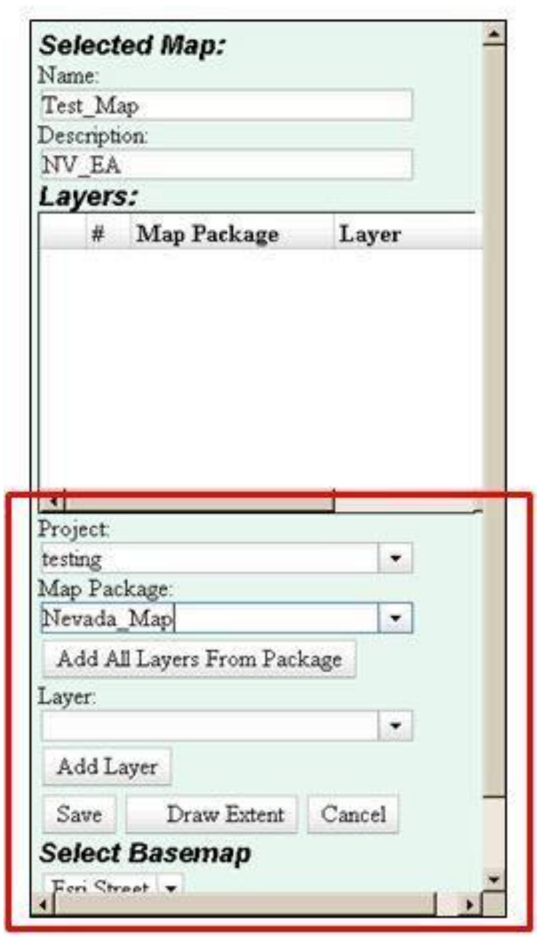
● **Overlay Transparency:** Move the slider right or left to control the image overlay's appearance.

4. Click in the **Name** box and enter the name for the map. Use the same name method as used in the past with the GeoPDF maps.

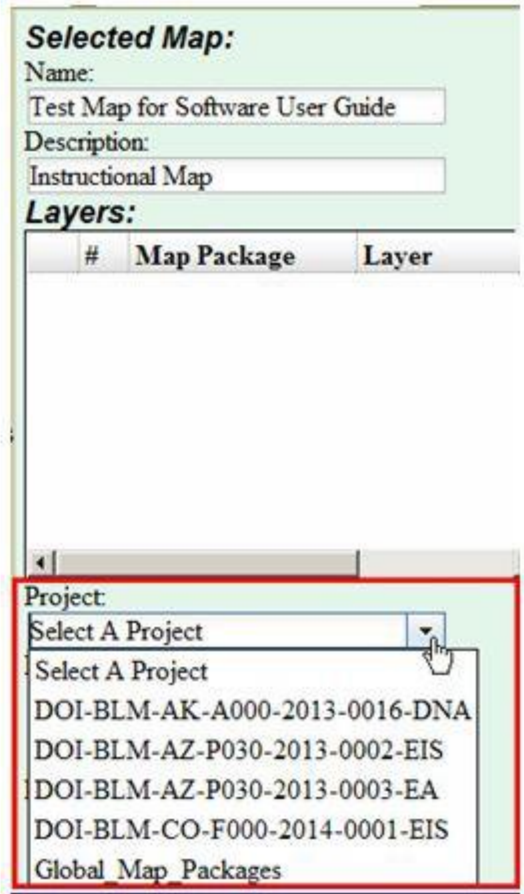
⚠ If you click **Save** without entering a name for you map, you will not be able to view it in Back Office or in the Public website. **Be VERY certain you name your map!**

5. Click in the **Description** field and enter a brief and concise description of the map.

6. Click the **New Layer** button to add layers to the map. The map definition area will change again as shown below.



7. Click on the drop-down arrow for **Project.** Select the NEPA number associated with the project.

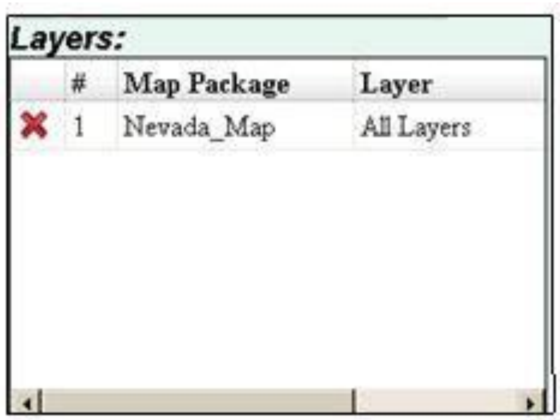


8. Click on the drop-down arrow for **Map Package**. Select the desired Map Package for the selected project.

9. Depending on the requirements of the map, you can add either all layers from the selected Map Package to the map, or add single layers :

a. To add **all layers** from the selected Map Package, click on **Add All Layers From Package.** All layers from the Map Package will appear in the **Layers:** window as shown in the image below.

i. To remove a layer, click on the big red X next to the layer in question.

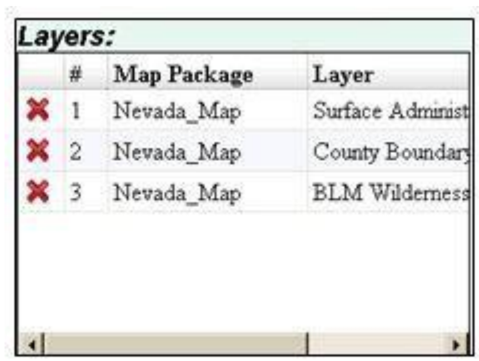


b. To add only a single layer from the selected Map Package, click the drop-down arrow for **Layer** and select the layer to add to the map. Once that layer name appears in the

Layer selection, click on **Add Layer.** The selected layer from the Map Package will appear in the **Layers:** window.

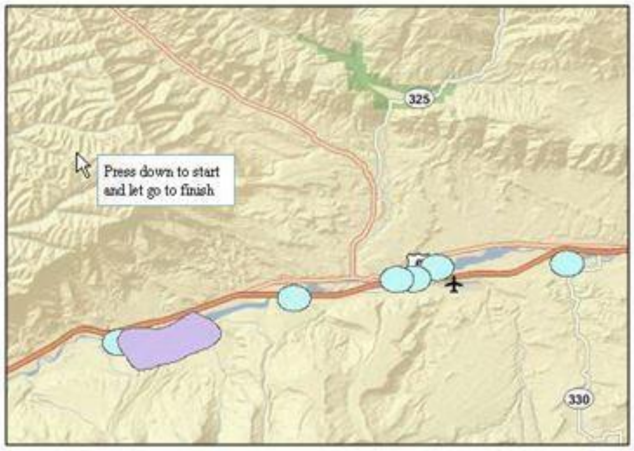
i. Continue to add new layers until all the layers required for this map have been added by again choosing **New Layer**, choosing a **Map Package**, and selecting the **Layer**, then choosing **Add Layer**.

ii. To remove a layer, **click** on the **Big Red X** next to the layer in question.

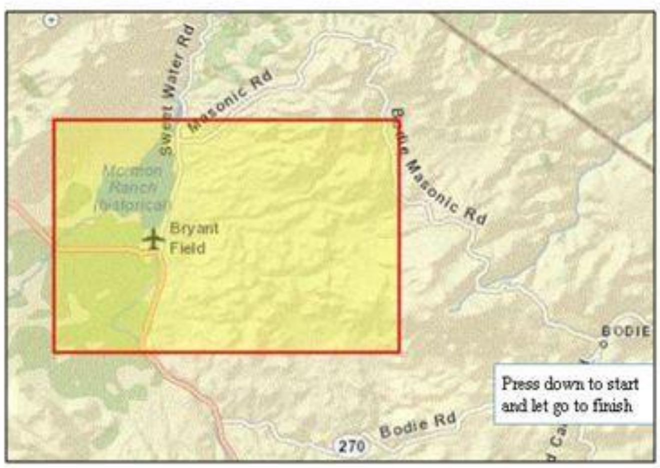


10. Once all the necessary layers have been added, click on the **Draw Extent** button. A check mark will appear on the **Draw Extent** button when this functionality is enabled.

After selecting **Draw Extent** move the cursor onto the map and the cursor will change as shown in the below image.

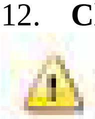


11. Click, then drag and draw a box around the area your map layers reference. This will define the map extent. The boundary of the extent will show as a red solid line and the area as yellow, as shown below. The map *will not* look yellow when viewed in the project's public website.

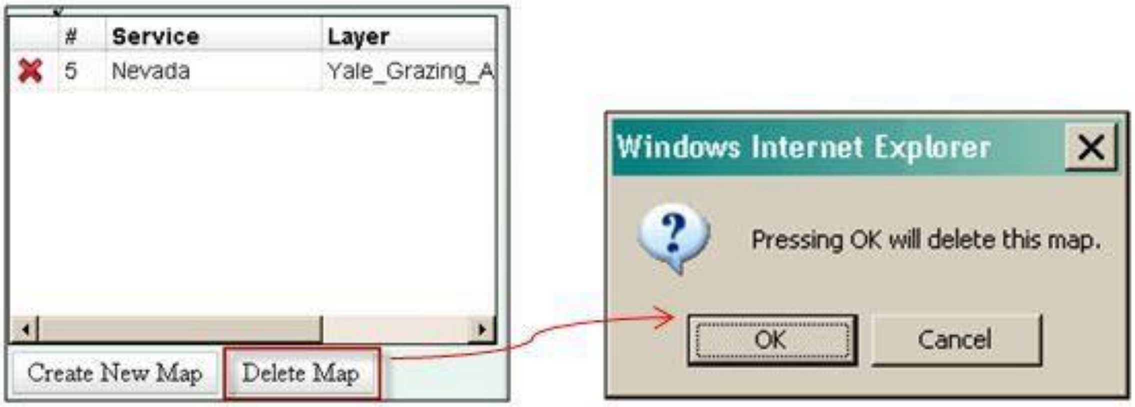


Important: To modify the extent drawn, do not click: **Cancel** because this will cancel the whole map. To modify the extent drawn, click and draw a new extent, and that will automatically replace the original extent.

12. **Click** on the **Save** button.

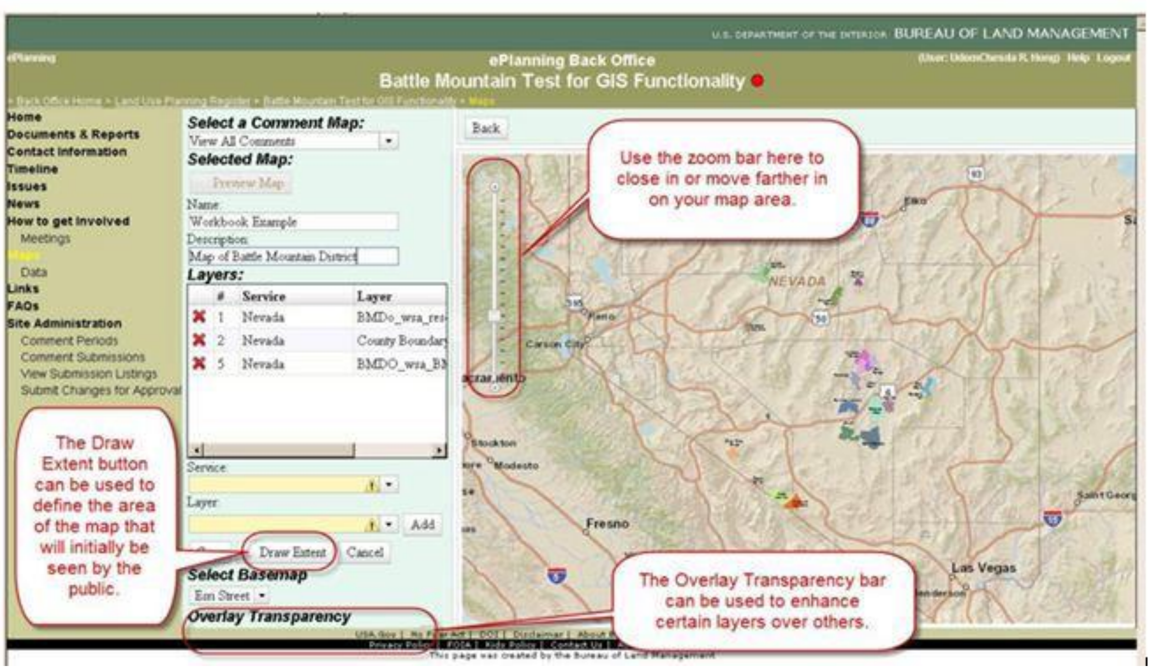
 ***NOTE: Once you save, it is not possible to add more layers.***

Notice that the screen changes. It is no longer possible to add layers, but it is possible to delete the map. If you click on **Delete Map**, you will receive a confirmation. Click on **OK** to delete the map or click: **Cancel** to return to the map.

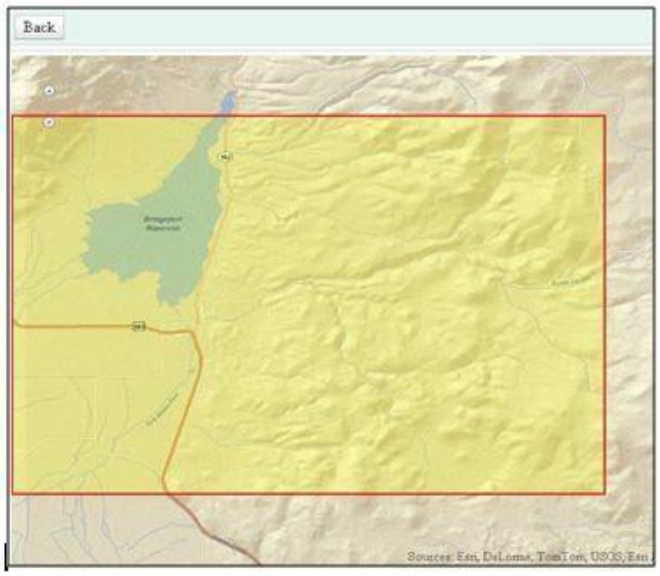


⚠ You may not delete a map while the project is in the approval process or has been published.

13. In addition to the **Draw Extent** feature, the **Zoom** and the **Overlap Transparency** features allow the user to zoom in on a particular area and adjust the way the layers are displayed. These features are outlined in the image below.



14. Click on the **Preview Map** button to view how the map will be displayed to the person viewing the map in the project public website. The map *will not* look yellow when viewed by the public.



15. Repeat steps **4 - 15** for all the maps you need to create.
16. When finished creating maps, click on the **Back** button to return to the project maps page.
17. You can see the maps you just created by choosing the **Maps** link which displays the maps page.

> **Note**
>
> The **Comment on Map** button is not enabled in Back Office. The button is located on the comment form on the BLM National NEPA Register once you have set up a comment period.

10.4.2. Publishing the Comment Enabled Webmaps

Before the maps are actually seen by the public, it is recommended that you finalize all other portions of the project website, such as filling in background information, contact information, and anything else that is pertinent to the project.

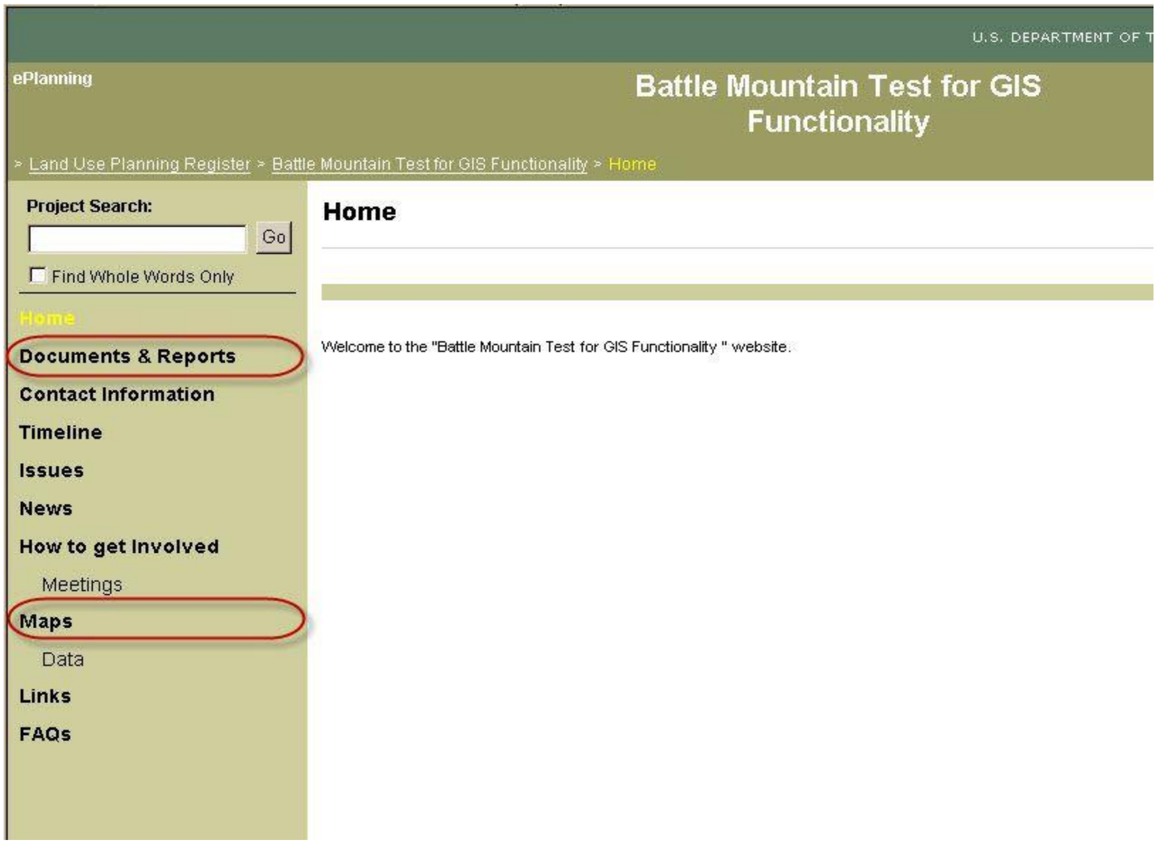
Make sure to set up a comment period for your project as well!
When you are ready to publish, submit the site to the public affairs official for approval.
When the site has been reviewed and approved, go ahead and click the **Publish** button immediately, or on a specified date.
Refer to the Back Office/Front Office chapter for more specific information on how to publish your project website and how to setup a comment period in ePlanning.

10.5. Understanding Public Involvement with Comment Enabled Webmaps

Once the project website is approved and published, the public will be able to search for the project and make geospatial comments on the maps. There will be two areas where the general public can view the maps. Let's quickly explore these two options.

- The **Maps** link will display all of the Comment Enabled Webmaps that were created for the project. In this area the public can only see the extent of the area selected and the layers for the map. Geospatial comments are not allowed here.

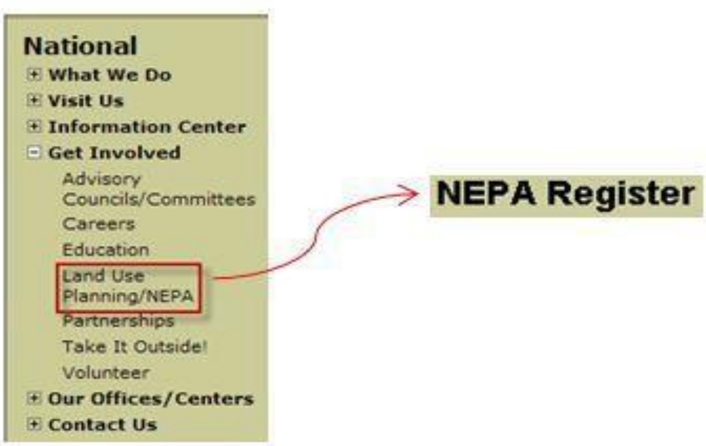
- The **Documents and Reports** link will display the Comment Enabled Webmaps, under the interactive document's public comment submission feature. It is here that the public will be able to make geospatial comments on the maps, if a comment period was setup for the document.



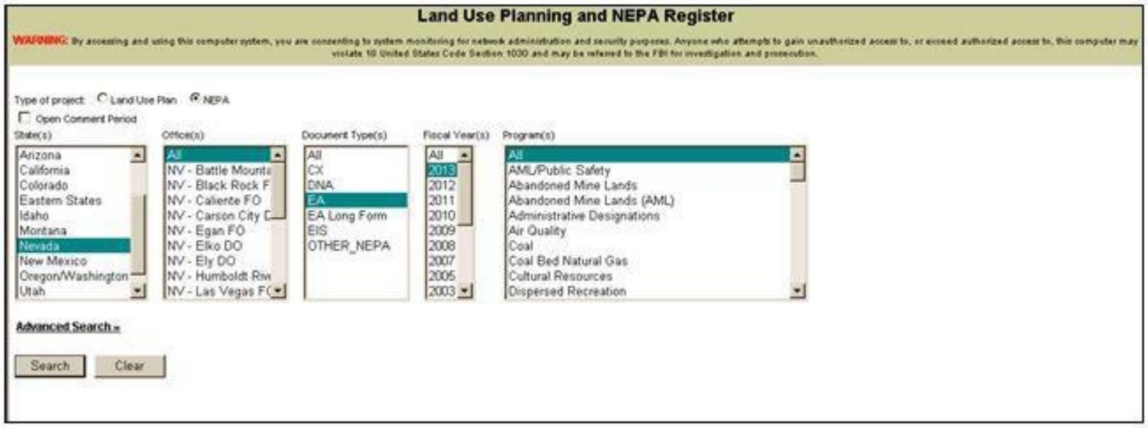
10.5.1. The Maps Link

Using Front Office, look for the project that was just published. Select the **Maps** section and explore the maps in this area.

1. Log into Front Office, navigate to the **BLM National NEPA Register** (or the register for Land Use Plans).



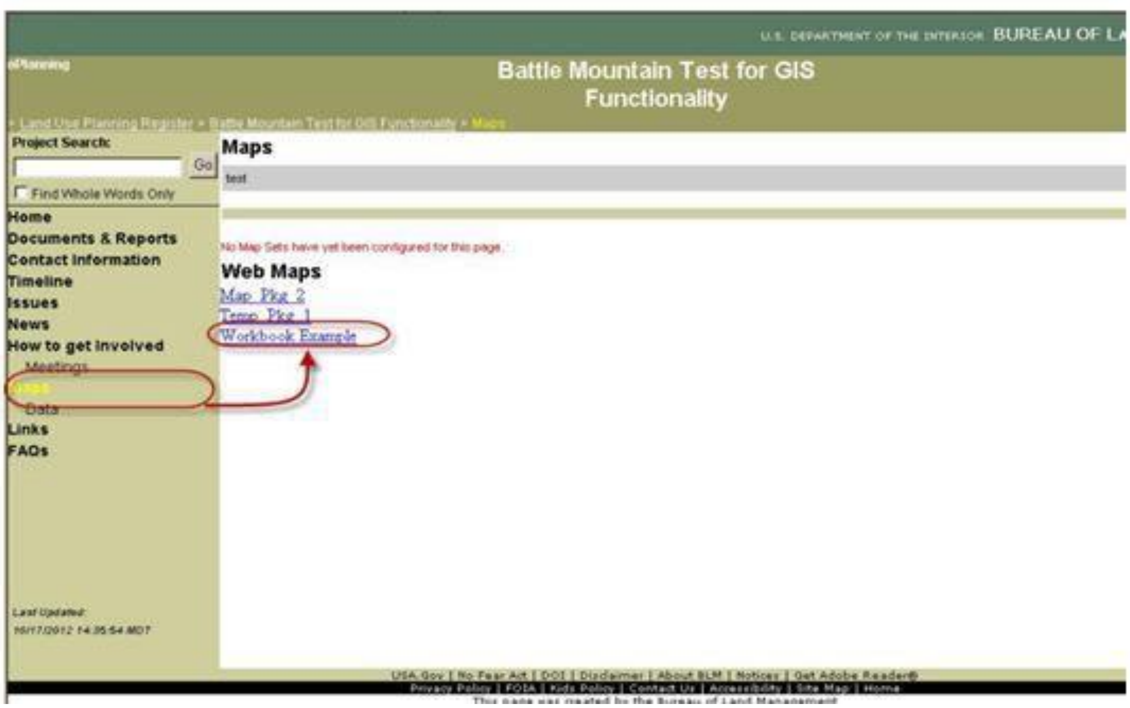
2. **Search** for the project using criteria to narrow the results. See the example shown below.



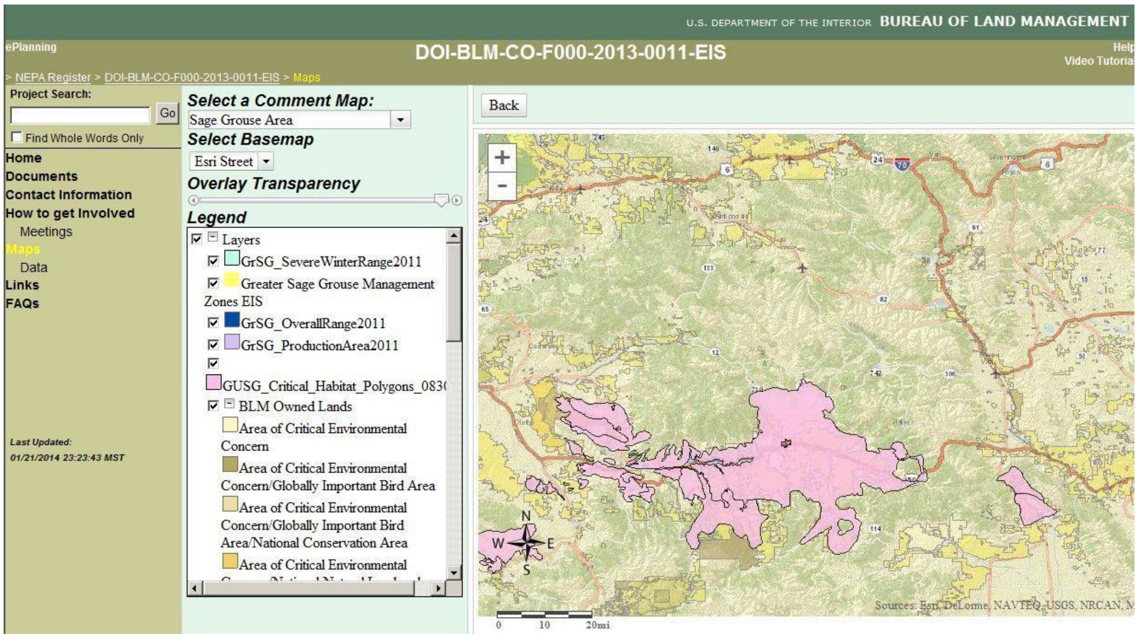
3. Then choose the project you want to view by selecting the **NEPA Number** hyperlink of the project from the list returned by the search command.

DOI-BLM-NV-S010-2013-0004-EA

4. Click on the **Maps** menu option in the left navigation pane. This will display the maps that have been published with the project. Then, select one of the Comment Enabled Webmaps that is available, as illustrated in the image below.



5. When the webmap is selected, the layers may take a few seconds to load. Here, you can zoom in and out of the map area, toggle the map layers on and off, and view the legend of the map features. Remember that this is just a reference point for viewers. Public comments on the maps are not allowed here, but is a great starting point for understanding the planning areas in relation to project document(s).



10.5.2. The Document and Reports Link

Using Front Office, look for the project that was just published. Select the **Documents and Reports** section and make comments on the maps in this area. Please note that menu options vary depending on the project type. For example, an EA project will only have a link called **Documents** rather than the **Documents and Reports** menu option.

This section will just focus on making the geospatial comments for webmaps. To complete the public comment submission (with the map comments), the entire commenting process will have to be completed.

Note

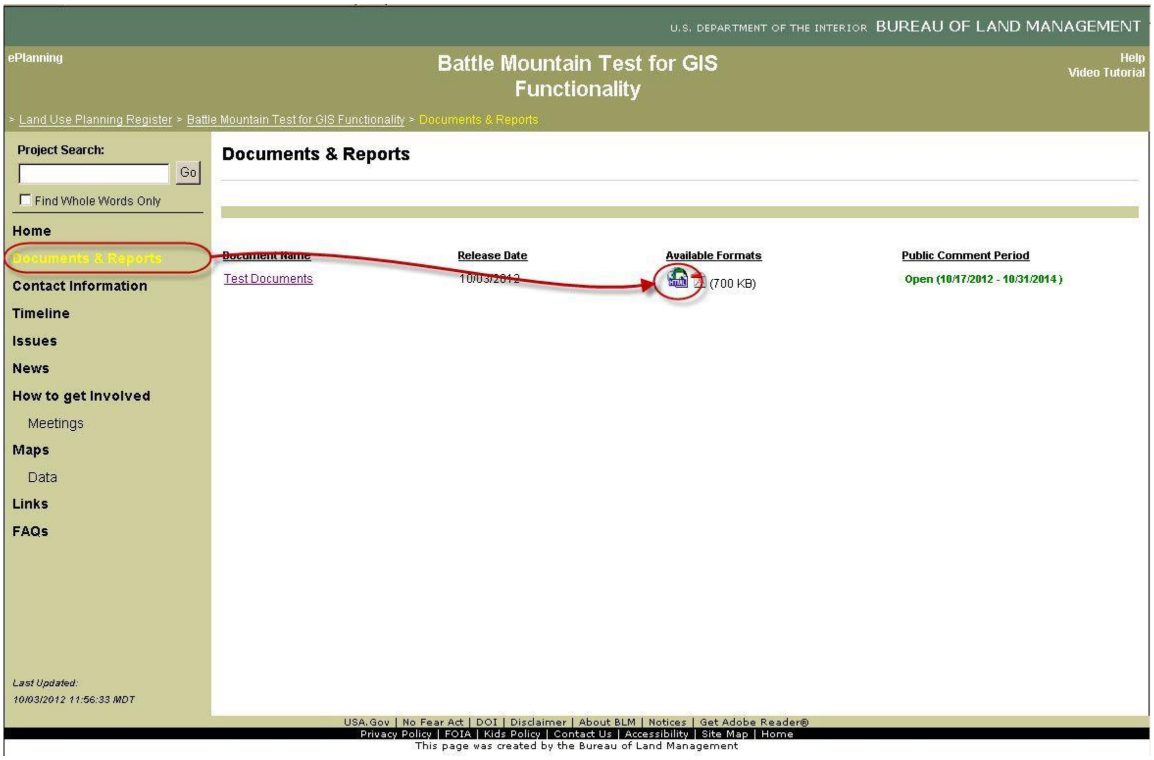
Remember that this process requires a comment period setup to fully utilize the geospatial commenting ability for the maps. Refer to the information above, or review the chapter on Back Office/Front Office, for more details on how to create a comment period for your

Example 10.2. Explore the Comment Enabled Webmaps in the Document and Reports Section

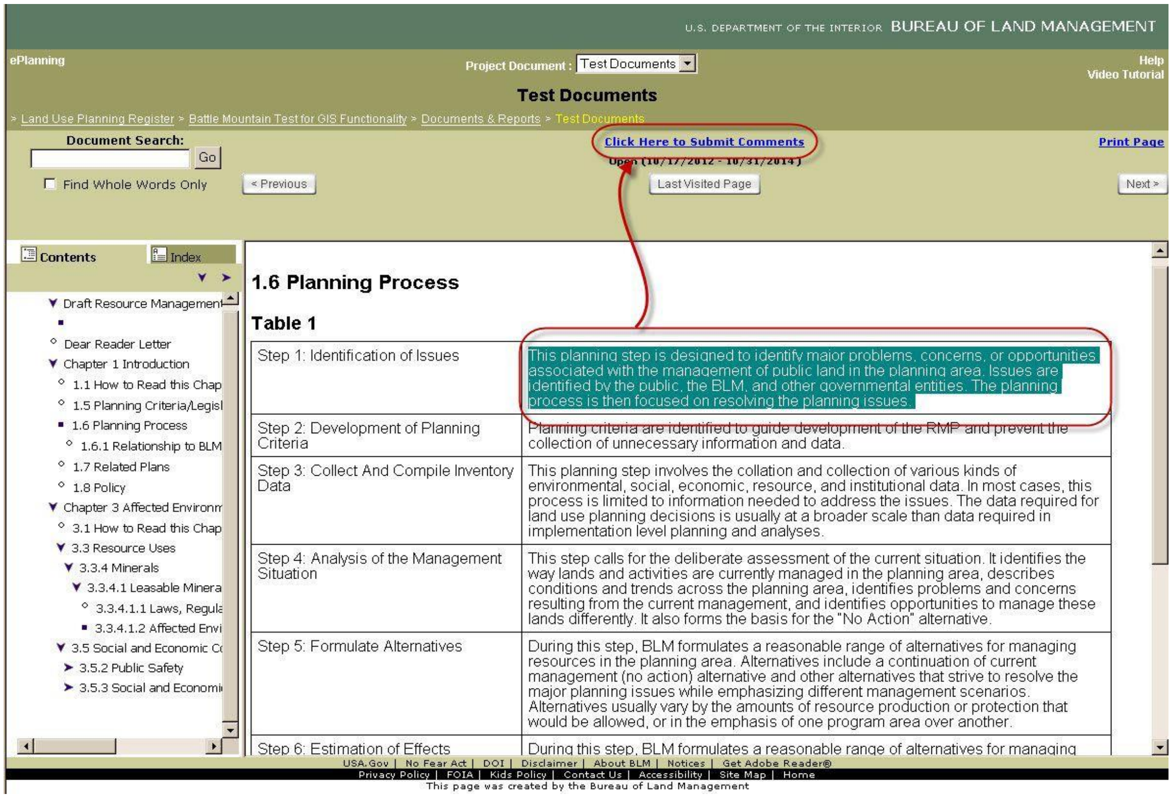
Take a few minutes to look at the maps under this section of the project's webpage.

Viewing this area of the project website:

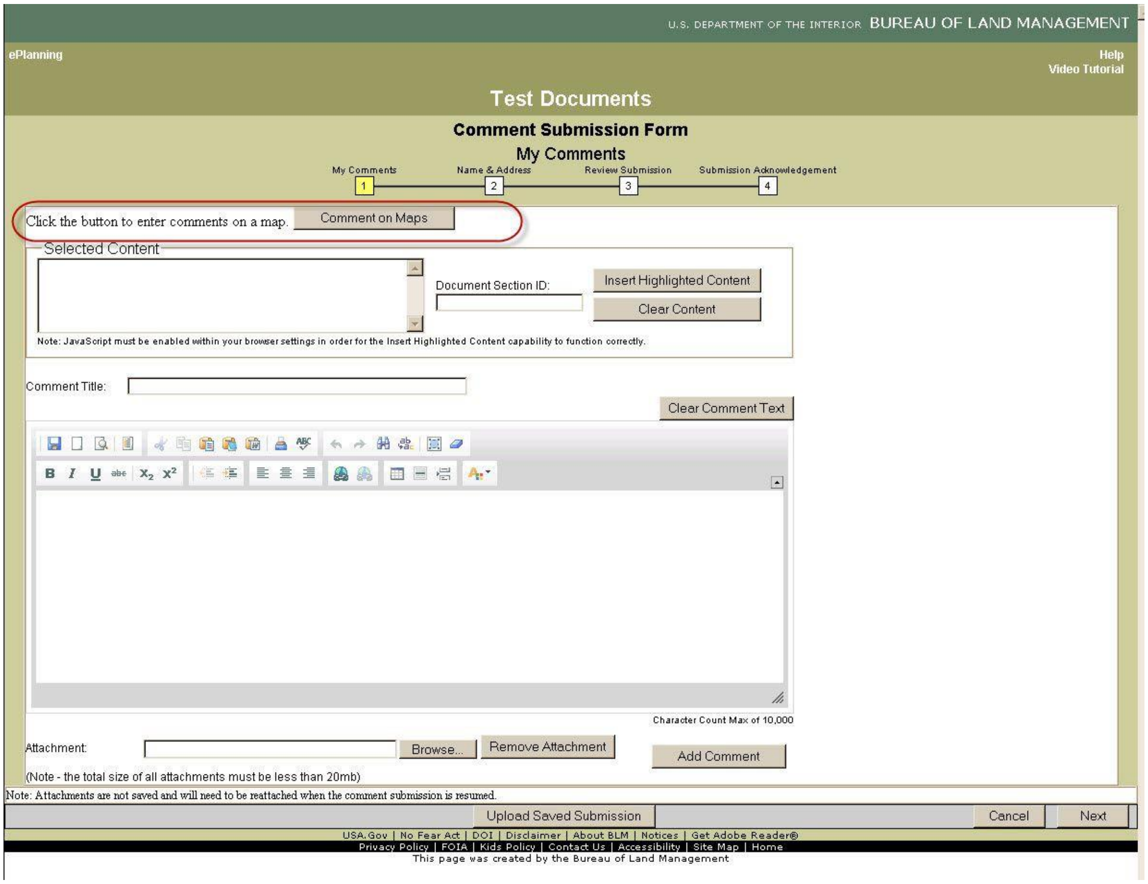
1. Click on the **Documents and Reports** link. Then, select the **Interactive Document** icon, as illustrated in the image below.



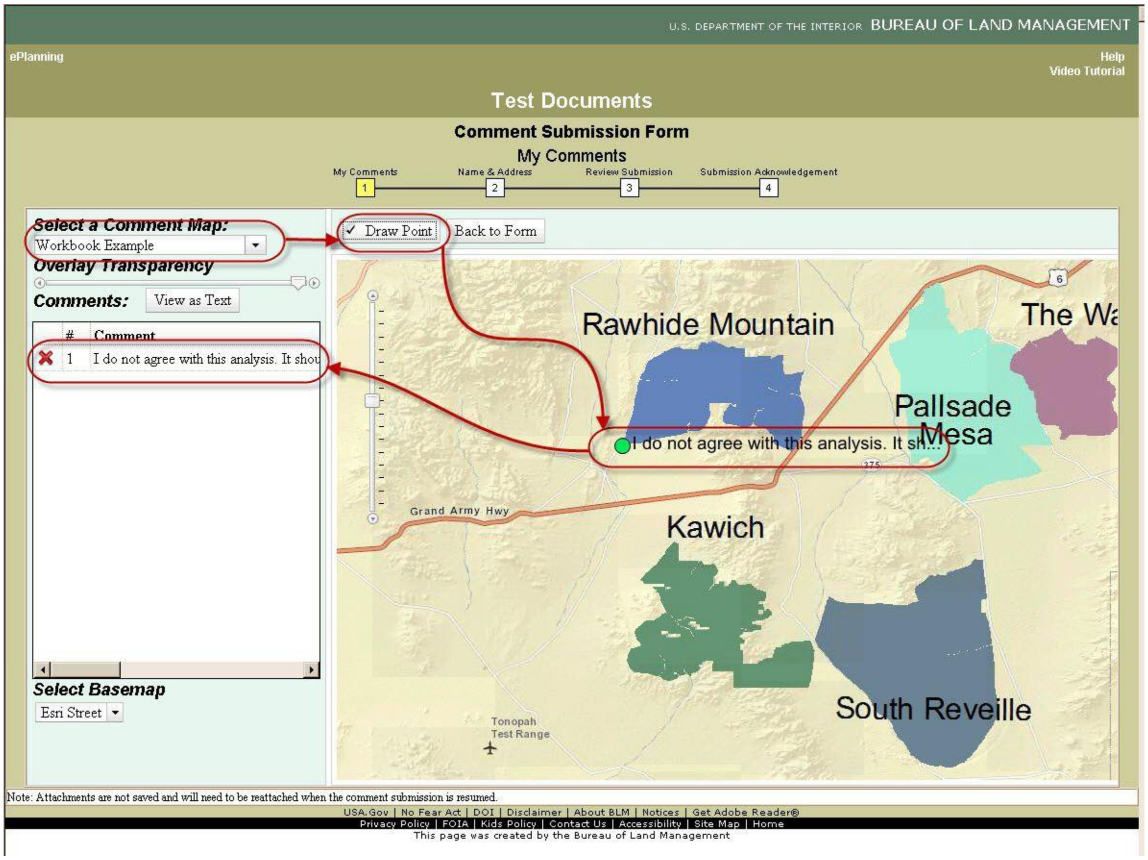
2. Highlight some content and click on the **Click Here to Submit Comments**link. You may choose the **Click Here to Submit Comments** link without any content as well, but in general comments will be referencing a certain part of the document.



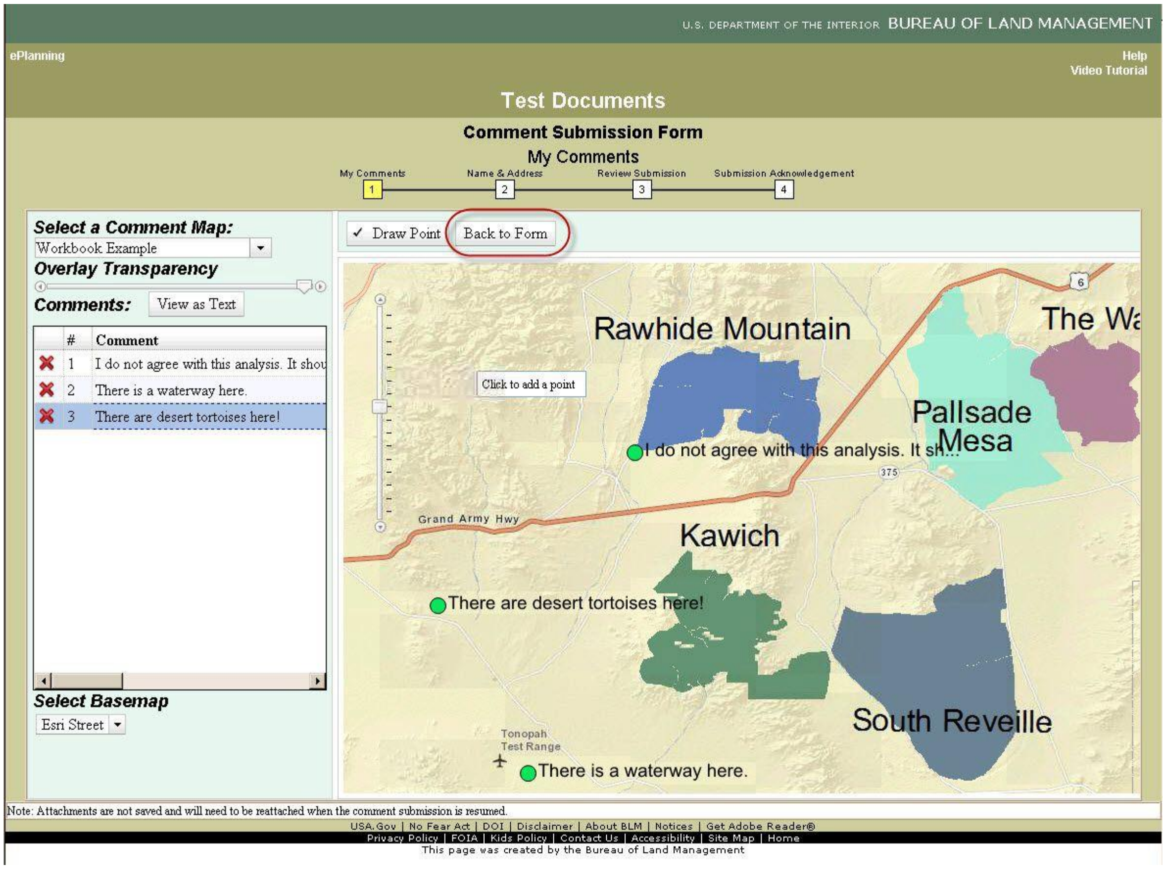
3. This will open up the public comment submission form. This will look familiar to the content reviewed during the Back Office/Front Office chapter. However, notice that there is one small difference here; we now have a section to comment on maps.



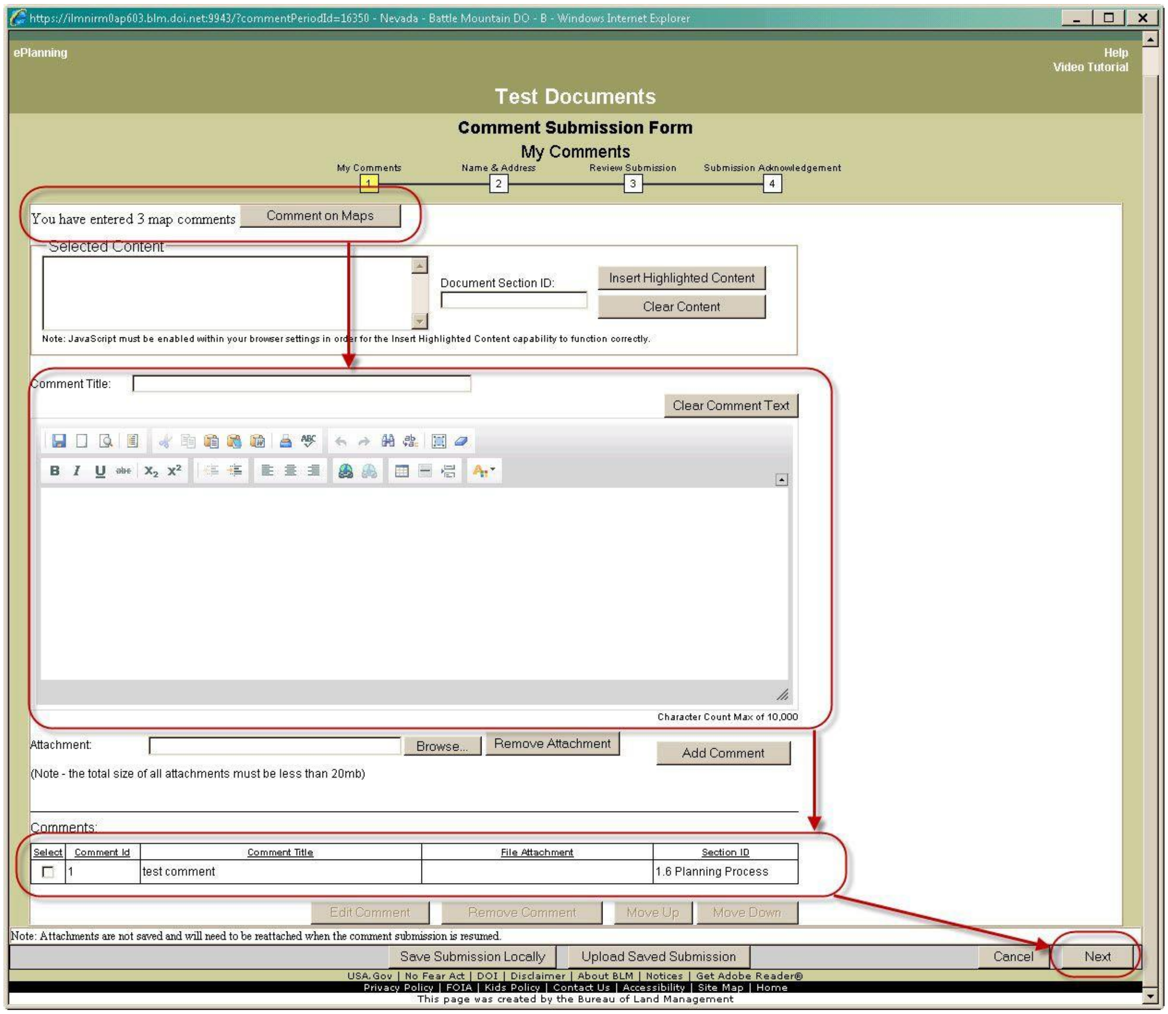
4. Go ahead and click on the **Comment on Maps** button.
5. The webmap feature will load up. From here, you can select a specific map to view using the **Select a Comment Map** drop down menu. You can also zoom in and out, or pan around to more specific areas using the tools provided.
6. In the example image below, the map titled **Workbook Example** was selected. Click on the **Draw Point** button, pick an area on the map, and make a comment on the XY coordinates. *For the moment, this map comment feature allows for only XY coordinates. We anticipate that the ability to comment using polygons and lines will be added in the near future.*



7. You may add as many geospatial comments as you would like. Each map comment is limited to 5,000 characters. You can switch between webmaps, using the starting dropdown menu. When finished, turn off the **Draw Point** button, and select the **Back to Form** button.



8. This will close the webmap screen and allow for further text comments to be made by the public. Notice that the number of comments on the maps is noted at the top of this section.

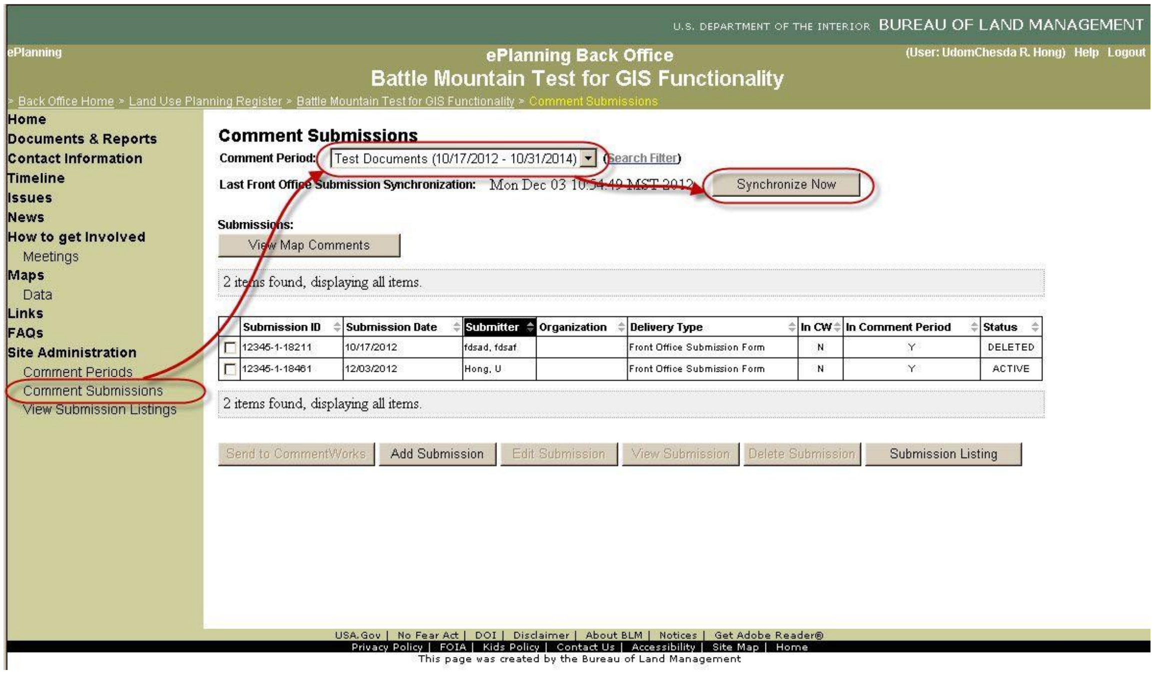


Continue on with adding in comments for the issue. You must enter a text comment even if it is only to reference the comment you placed on the map. If needed, refer to the Back Office/Front Office chapter on how to proceed with using the basic portion of the public comment submission form.

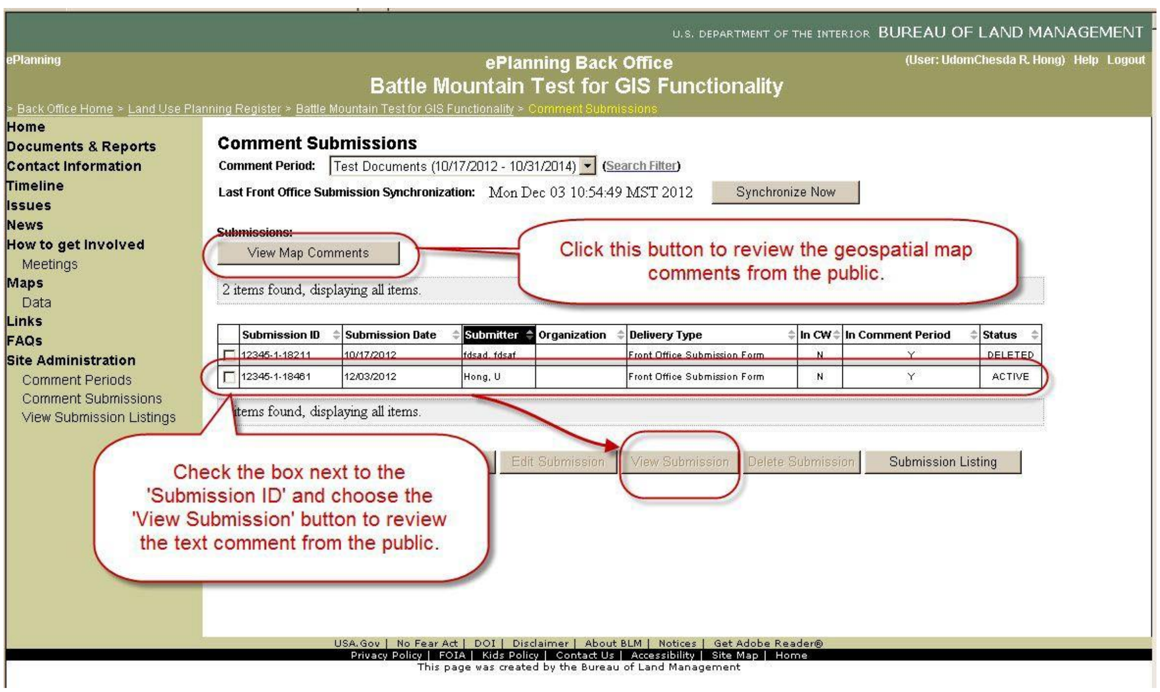
The last section of this chapter will briefly discuss how to analyze those geospatial comments that were received from the public.

10.6. Analyzing the Map Comments in the Back Office

Now, let's take a look at what to do with those comments that were made by the public. In **Back Office**, you will be able to review the public comment submission just as it was discussed in the Back Office/Front Office chapter.

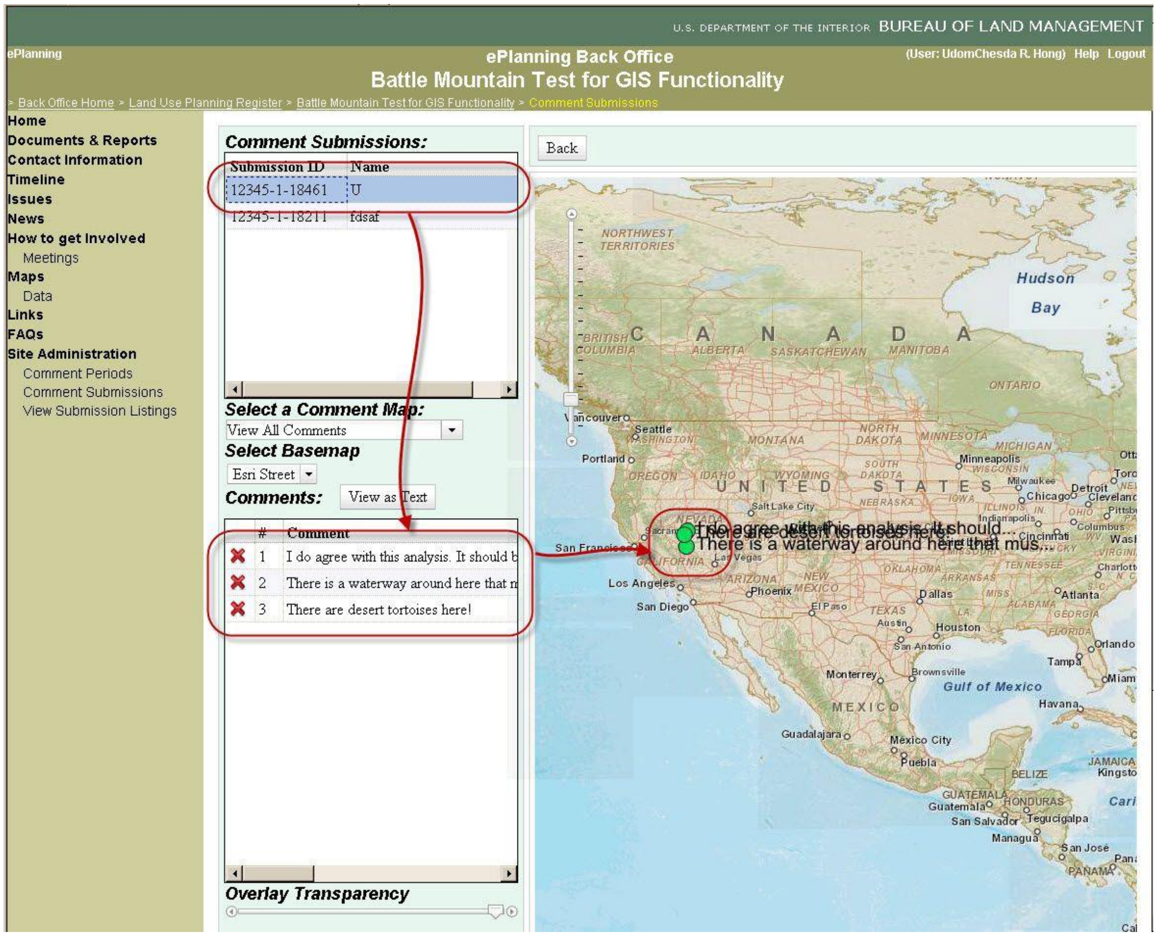


(See image above.) The webmaps feature allows the user to review the geospatial comments as well general comments. Under the **Site Administration** menu for your website, click on the **Comment Submissions** link and choose a **Comment Period.** You may have to select the **Synchronize Now** button to bring in any recent comments.



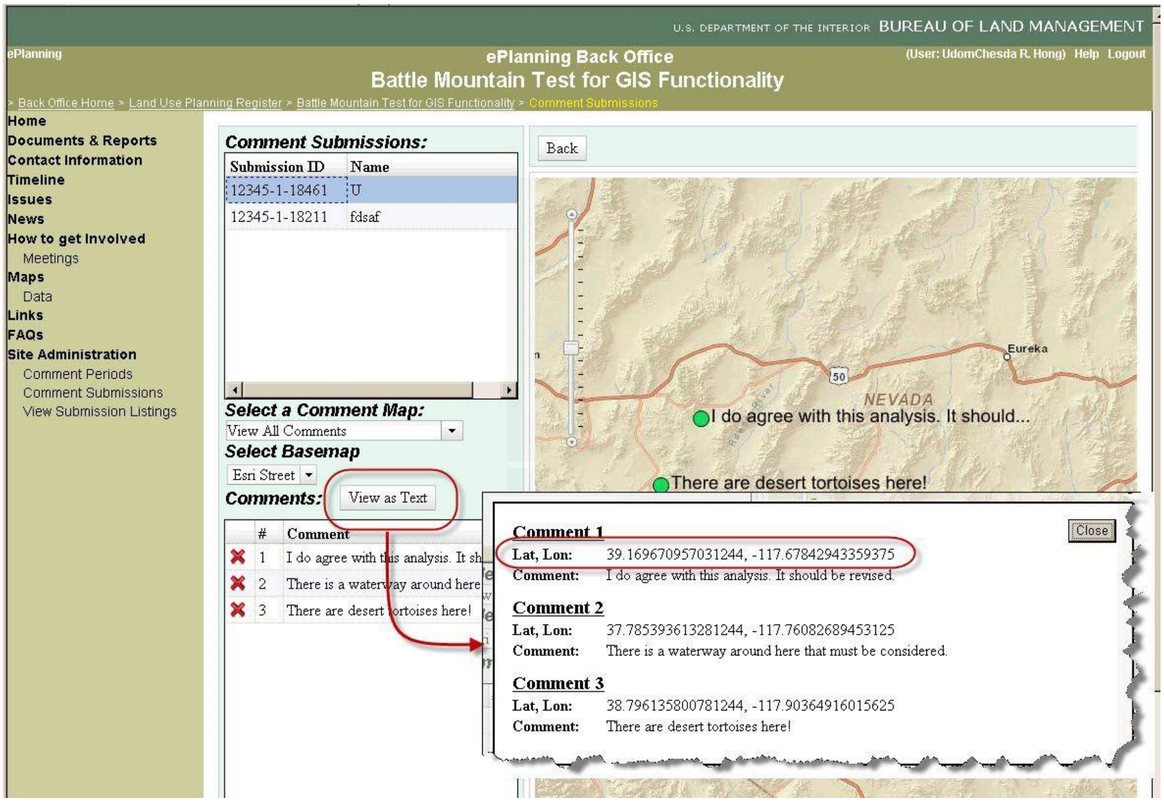
From here (see image above), you can view the text comment by checking the box next to the submission and going to the **View Submission** button. Reviews of this type were discussed in the Back Office/Front Office chapter.

Alternatively, you can click the **View Map Comments** button to view the geospatial comments that were made by the public on the webmap(s).



When the **Comment Enabled** Webmaps screen opens (see image above), you can select a specific **Submission ID** to view, which will, in turn, load the comments below, as well as where on the map those XY points were made. Of course, there are additional features here available for you. You can choose a different map, if you have multiple maps, under the **Select a Comment Map** dropdown menu. Also, you can zoom in and out, and pan around the map to get more detail(s) on the map display.

If you choose the **View as Text** button, next to the **Comments** heading (see image below), you will get the exact latitude and longitude coordinates for each geospatial comment that was made. This information can be shared with the **GIS** specialist in your office, if map revisions or modifications are needed.



10.7. Decision Maps

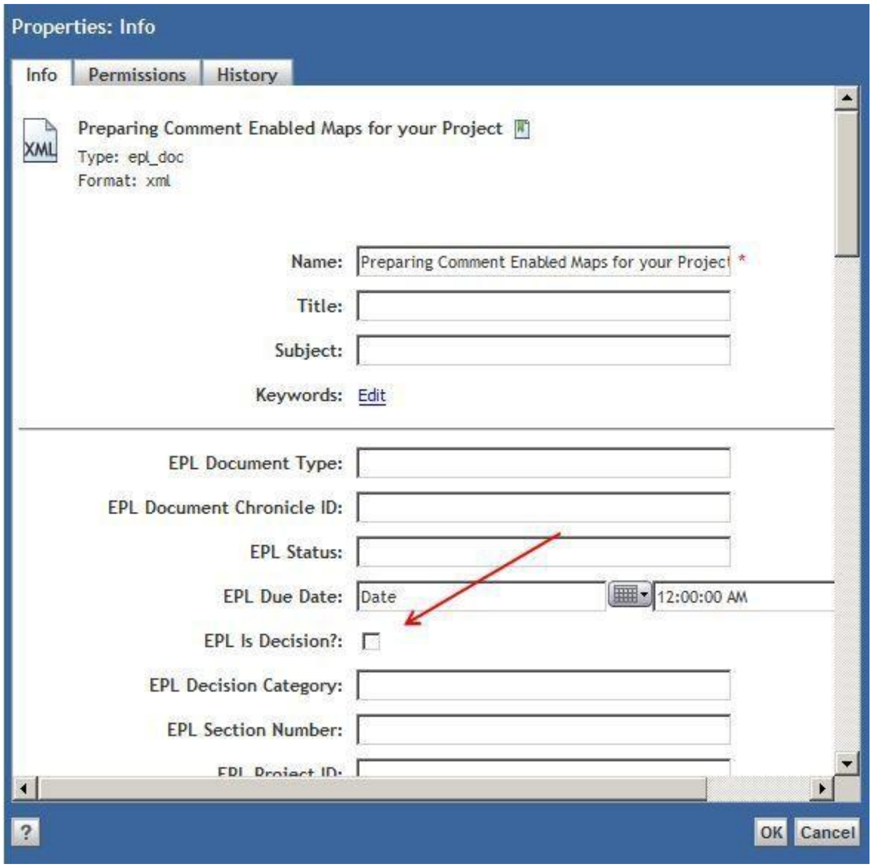
The Decision Map function in the ePlanning Back Office provides the functionality to link ePlanning Interactive Document sections marked as Decision Records/Records of Decision to user-defined polygons for public viewing via the ePlanning Front Office. Users will have the ability to identify Decision sections of an eXtensible Markup Language (XML) document, create a Decision Map complete with area polygons, and link those polygons to the identified Decision sections.

Important

The GIS Specialist downloading the **Service Definition** must have an active ePlanning account in order to save the **Service Definition** to the ePlanning Project folder. See the steps in Mapping the GIS earlier in this chapter for instructions as they are the same.

Preconditions: *Any decision document to be attached as part of the Interactive Decision Map function in Back Office must first be marked as a Decision Document in Webtop. An "Interactive Document" Build Type must be created in Webtop for the Decision Document of the Project.* To

mark a document as a decision document you right click on the XML document section, select properties, and then check the box that says "EPL Is Decision?" and then choose "OK".



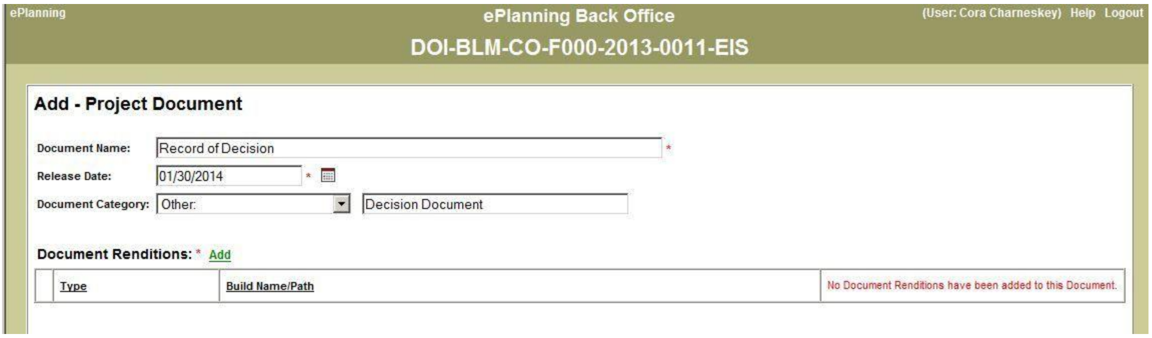
Once you have marked your XML document or document section as a decision, then you will need to create a build of that decision document to upload into back office.

To create a Decision Map (similar to creating comment maps):

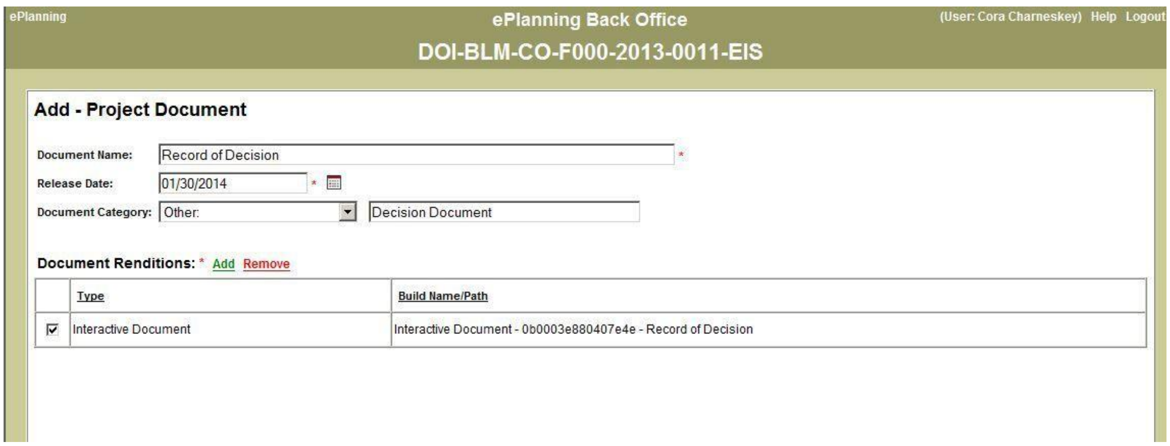
1. Log in to **Back Office** and select the **NEPA** project.

2. Click on the Documents section and choose **Add**.

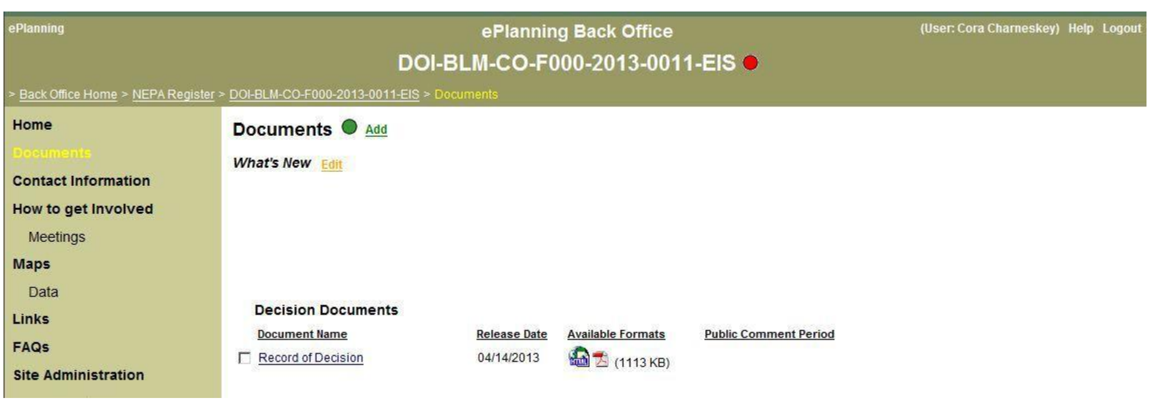
3. The Add-Project Document screen appears. Locate the **Document Name** box and enter a name for the decision document. Enter a Release Date manually or by selecting the calendar icon and create a new category if you wish by choosing **Other** and then typing in **Decision Document**. Then click: **Add** in the **Document Renditions** section.



4. Select: **Build** as the **Rendition Type** and select the **Interactive Document** created in Webtop as the decision document. Then click: **Add**.
The **Add-Project Document** screen will automatically refresh with the **Document Renditions** now available.



Check the document rendition, and then click: **Add.**The**Back Office Documents Page** automatically refreshes with the new document available.



5. From the **Back Office Home Page**, click the **Maps** link in the left-hand navigation page. Click on **Add Decision Maps** at the top of the display page. This will display a map page where you will create the decision map(s) from the layers available.
6. Click in the **Name** box and enter the name for the map. Use the same name method as used with the **Comment** maps.

If you click **Save** without entering a name for your map, you will not be able to view it in

Back Office or in the Public website. ***Always name your map.***

7. Click in the **Description** field and enter a brief and concise description of the map.

8. Click the **Document** drop-down to select the decision document associated with the project to be used for the map.

9. Click the **Rendition** dropdown to select the version of the decision document identified.

10. Click the **New Layer** button to add layers to the map.

11. Click the drop-down arrow for **Project.** Select the **NEPA** number associated with the project.

12. Click the drop down arrow for **Map Package**. **Select** the desired **Map Package** for the selected project.

13. Depending on the requirements of the map, either all layers from the selected Map Package can be added to the map, or single layers can be added to the map:

a. To add all layers from the selected Map Package: Click **Add All Layers From Package.**

All layers from the Map Package will appear in the **Layers** window.

i. Add single layers by selecting **New Layer** and repeating the process. Continue to add new layers until all the layers required for this map have been added.

ii. To remove a layer, click on the **Big Red X** next to the layer in question.

b. To add only a single layer from the selected Map Package, click the drop-down arrow for **Layer** and select the layer to add to the map. Once that layer name appears in the Layer selection, click **Add Layer.**The selected layer from the Map Package will appear in the **Layers** window.

i. Continue to add **New Layers** until all the layers required for this map have been added.

ii. To remove a layer, click on the **Big Red X** next to the layer in question.

14. Once all the necessary layers have been added, click on the **Draw Extent** button. A check mark will appear on the **Draw Extent** button when this functionality is enabled. The curser on the map will change as shown in the below image.

15. Click then drag and draw a box around the area your map layers reference. This will define the map extent. **Important:** To modify the extent drawn, do not click **Cancel** because this will cancel the whole map. To modify the extent drawn, click and draw a new extent and that will automatically replace the original extent.

16. Click the **Save** button.

NOTE: Once you save, it is not possible to add more layers.

Notice that the screen changes. It is no longer possible to add layers, but it is possible to delete the map. If you click on **Delete Map**, you will receive a confirmation. Click **OK** to

delete the map or **Cancel** to return to the map. A map may not be deleted while the project is in the approval process or has been published.

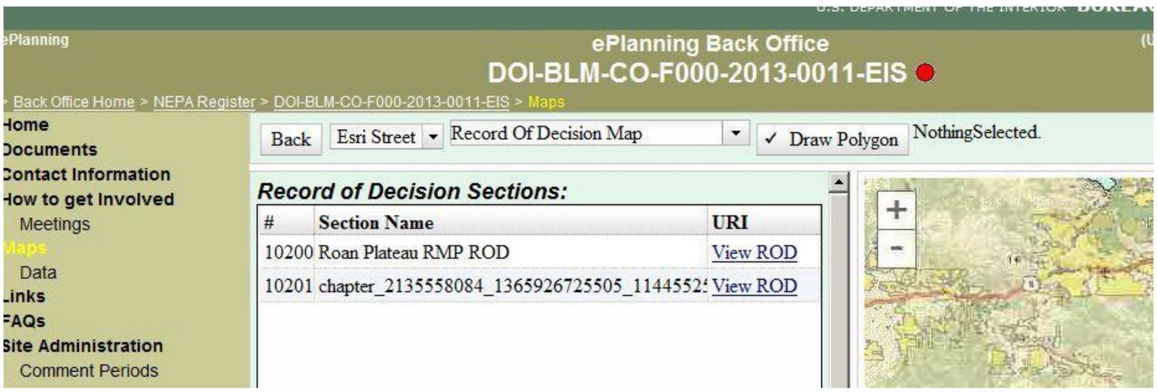
17. Click **Preview Map** to view how the map will be displayed to the person viewing the map in the project public website. The map *will not* be yellow when viewed in the project's public website.

18. **Repeat steps 6 - 17 for all the maps you need to create.**

19. When finished creating maps, click **Back** to return to the project **Maps** page.

20. The decision map(s) you just created will be listed on the **Maps** page. Once a map has been created, layers cannot be added or removed. Click the **Add Polygons and Links** link next to the **Decision Map** just created.

3. The **Decision** sections designated the project (in Webtop) should appear in the **Record of Decision Sections** table. Click on the **Draw Polygon** button. A check mark will appear on the **Draw Polygon** button when in edit mode.



4. On the map, left-click your mouse at the starting point of the polygon you wish to create. Then left-click again for each of the vertices (minimum of three). Finally, double-click to complete the polygon. After double clicking to complete the polygon, the outline will automatically turn green:

To stop the drawing tool, click the **Draw Polygon** button so the check mark disappears.

a. To draw multiple polygons or add polygons to the original polygon, ensure the **Draw Polygon** button is checked, and repeat step 23 until all polygons are drawn.

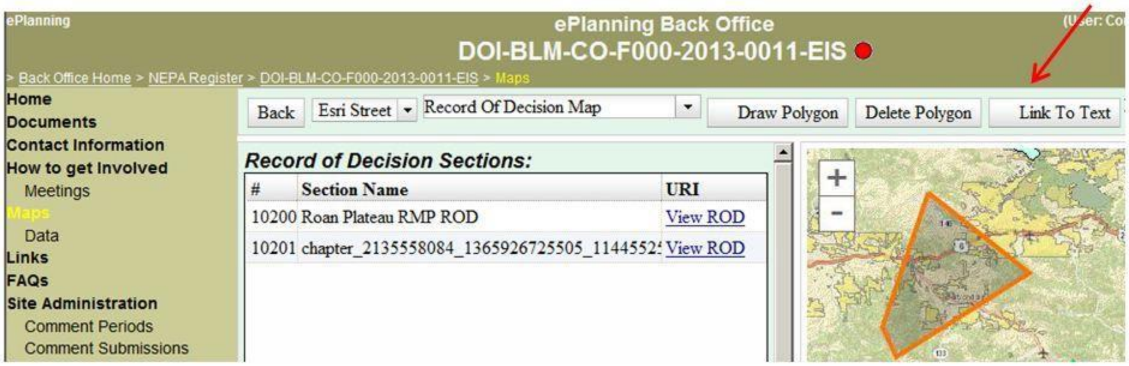
b. To delete a polygon, first stop the drawing tool by clicking the **Draw Polygon** button so no check mark appears. Then, click once over a polygon, which will select the polygon

with an orange outline. When selected, click the **Delete Polygon** button and the screen will automatically refresh with the changes.

c. To unselect a polygon, click the **Unselect** button and the additional menu options will be dismissed.

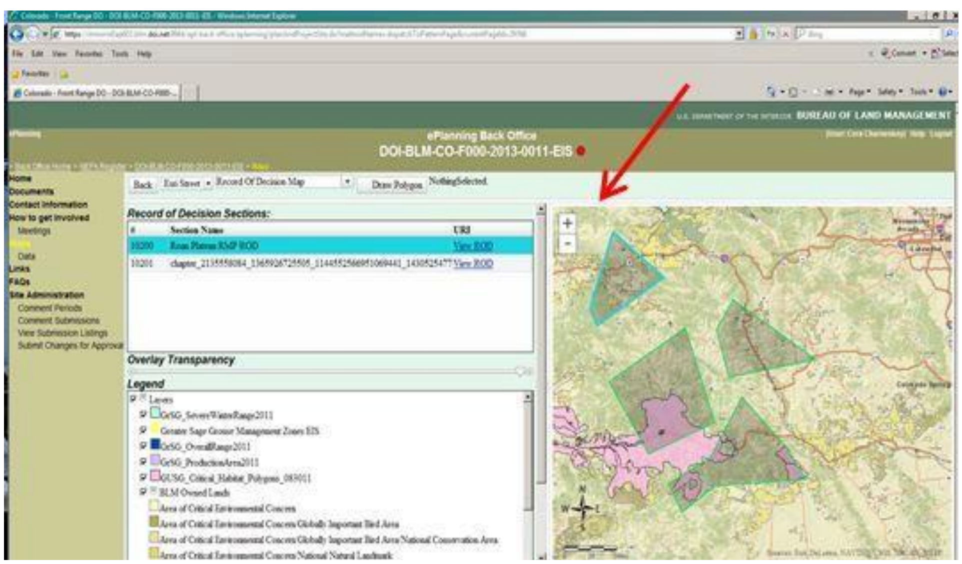
d. When you are finished drawing your polygons, choose **Draw Polygon** to unselect the drawing mode.

5. To link a decision document to a polygon **click once** over a polygon so the polygon outline turns orange and additional options will appear above the **Map** window. Click the **Link to Text** button. A check mark will appear in the **Link to Text** button.



Remember: The ***Draw Polygon*** button must be disabled so that the check mark does not appear.

Left-click on the section in the **Record of Decision Sections** table that will be linked to the polygon. The section title will be highlighted in orange and automatically linked to the polygon. Once the section title is highlighted in orange, click the **Unselect** button. To verify that the **Record of Decision (ROD)** section(s) have been linked to a polygon, use the mouse to hover over either the polygon or the section name, and both should appear in blue:



a. To break a linkage between a document section and a polygon, select one of the Decision sections by left-clicking the text, which will make the text and polygon highlighted in orange. Left-click on the highlighted (linked) **Decision** text to un-link the text from the polygon. The Decision text should no longer be highlighted in orange. Click the **Unselect** button to de-select the text/polygon.

In addition to the interactive comment map tool in ePlanning, the public now has an option to view a decision map and its associated decision document in ePlanning. The interactive decision map offers new functionality and tools that link official decision documents to an interactive map and the exact location identified by a drawn polygon. This provides ease of access and convenience to the public, while increasing transparency and the level of detailed information.

1. From the BLM.gov home page, navigate to the **BLM National NEPA Register** .
2. Search for the project using criteria to narrow the results.
3. Click the **NEPA Number** hyperlink of the project in the search results that you wish to view.

4. Click the **Maps** menu option in the left navigation pane. This will display the maps that have been published with the project.
5. Click the **Decision Map** you wish to view.
6. **Map Definition Area:** This area provides a map legend and map name.
7. **Map Area:** This area is the map as defined by the NEPA project team.
8. Left-click over a polygon to highlight it (in orange). The linked decision document in the

Record of Decision Sections window will also be highlighted in orange.

9. Click on the **Decision Document URL** titled **View ROD** to launch the decision document section(s) that have been published in association with the project area.